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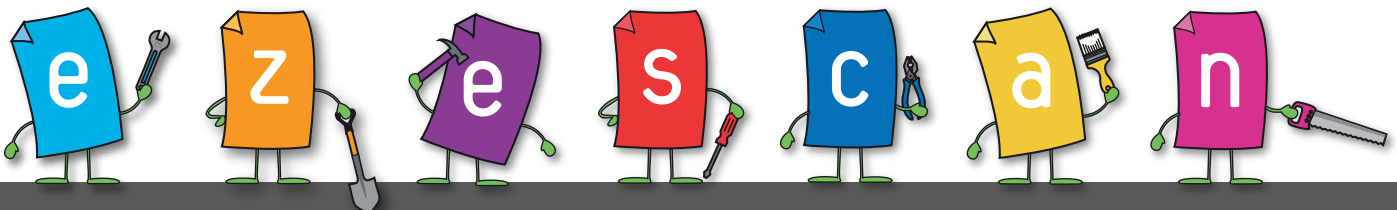
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Devil is in the detail for data retention:survey

Globally organisations are struggling with implementing their information retention plans. Only a third report theirs is fully operational, according to Symantec's 2012 Information Retention and eDiscovery Survey*.

Nearly two-thirds (60 percent) of organisations say they have a formal retention plan, yet only 34 percent report those plans are fully operational. The perceived cost of implementing their plans is reported to be the most common reason why organisations are lagging in plan implementation. The survey found that only 7 percent of organisations don't have any plans in place, a 50 percent drop from 14 percent of organisations reported in the 2011 survey. Even more concerning is that while they received on average 17 requests for electronically stored information, these requests failed 31 percent of the time. This is significantly higher than the 20 percent of failures reported in 2011. Each time a failure occurs, the organisation is at risk.

Forty-three percent reported the inability to make decisions in a timely fashion as the biggest consequence of these failures. Other consequences reported include damage to reputation, compromised legal position, fines, raised profile as a litigation target and court sanctions.

(*Symantec surveyed IT executives at 500 organisations with more than 500 employees in the US, UK, Canada and Germany).

ECM sweeps into NZ govt

Four major New Zealand government bodies have announced plans to issue a simultaneous tender for Electronic Content Management (ECM) solutions. The Ministry for Primary Industries, Department of Internal Affairs, Department of Conservation and the New Zealand Police will take the digital leap together.

According to the joint announcement, "The intent is to provide a common capability offering via an all of government approach that can then be used within the wider public sector should other agencies elect to participate in the arrangement once established."

Expected out in March 2013, the Request for Proposals (RFP) will encompass three core technologies (records management, document management, web content management) and a range of related technologies, such as: archiving, workflow, and collaboration.

BAE Systems Detica in APAC

Information security and management consultancy BAE Systems Detica is expanding its Asia Pacific footprint. BAE Systems Detica specialises in delivering information intelligence solutions to government and commercial customers and is part of BAE Systems, a global defence and security company with over 100,000 employees worldwide.

Incorporating BAE Systems' past acquisitions including Stratsec and Norkom, Detica's cyber security, financial crime and intelligence businesses will now operate as one organisation across Australia and Asia Pacific - forming part of one global cyber-security company.

BAE Systems Detica, Asia Pacific and Middle East Managing Director, Richard Watson said, "Cyber security is a global problem which requires a global response. As such, we have re-aligned our business to reflect this."

"In Australia, we already have a significant cyber security capability and an established footprint through our recent acquisitions of the Norkom and Stratsec businesses. We have trusted client relationships across government and commercial markets and look forward to providing them an expanded cyber product and services portfolio."

Pingar begins taxonomy trials

Pingar, the New Zealand provider of unstructured data management solutions, has announced it has begun trials of its automated Taxonomy Generator Service with selected customers.

The Service enables enterprises to generate instant taxonomies from an analysis of the content of large internal document sets. The Pingar research team, headed by Dr. Alyona Medelyan & Professor Ian Witten, has combined natural language processing and machine learning technologies with Linked Data to create a unique approach to the challenge of automatic taxonomy generation.

Peter Wren-Hilton, CEO of Pingar said: "Building enterprise taxonomies 'on the fly' is one of the true holy grails of providing real structure to the 80% of unstructured data held by enterprises today.

"Custom-built taxonomies have traditionally been both expensive to build and expensive to maintain. The Pingar Taxonomy Generator Service allows enterprises to build multiple taxonomies 'on the fly' in order to manage departmental, project or enterprise-wide document sets."

"The Pingar Taxonomy Generator Service supports a wide range of unstructured data types including Office documents, PDFs, emails and their attachments", Wren-Hilton added. "The launch of the beta Pingar Taxonomy Generator Service is the culmination of two years dedicated research work by some of the leading experts in this field."

Dr Alyona Medelyan, Pingar Chief Research Officer, writes on the company blog, "We argue that a useful taxonomy is one that contains terms relevant to the documents it is meant to organise. These terms can be sourced from existing taxonomies, Wikipedia, using entity and terminology extraction algorithms.

"Then, it's the matter of grouping these terms into a meaningful hierarchy."

The Pingar Taxonomy Generator receives as an input, documents in various formats, which may be stored on a file-share, in a document management system such as SharePoint, or on an Exchange Mail server.

These documents are then processed and analysed using a variety of tools and datasets, in order to extract taxonomy terms and relations between them. The output is a taxonomy, which combines these terms and relations into a single hierarchical structure useful for document organisation.

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Hyland Software launches Aussie cloud

Hyland Software has launched a locally hosted version of its cloud ECM offering in Australia. The cloud software solution called OnBase Online is available for a monthly software subscription and data hosting fees. Or just the hosting only where customers purchase perpetual licenses of the OnBase software and just pay the monthly hosting fee.

"Many Australian organisations looking to host document management, workflow and capture in the cloud have been reluctant to embrace solutions that require offshore hosting," said Lee Whincup, Sales Manager Australia and New Zealand for Hyland Software.

The recent addition of data centres in Japan and Australia has boosted the worldwide footprint of OnBase Online, the cloud-based deployment, which has been available for more than 10 years.

Enquiries to lee.whincup@hyland.com

AEC looks to capture its future

The Australian Electoral Commission (AEC) has flagged a move to electronic capture and processing of more than 150,000 enrolment forms a month it currently receives on paper and manually processes. In a tender, the AEC called for bids on scanning and archiving of the paper forms that it must retain to comply with the Archives Act 1983. The AEC asked for the tenderers to also include a proposal for a digital automated processing solution.

The AEC processes up to 150,000 enrolment forms per month during a non-election period but this figure increases significantly during a federal election or referendum event. The AEC's tender called for an outside bureau to scan all the paper forms after processing, send the TIFF images back via secure ftp and destroy the paper originals after three months.

However the tender documents state that "The AEC is moving toward a streamlined, modern approach to enrolment processing. Forward scanning and optical character recognition (OCR) or intelligent character recognition (ICR) may form the basis of this approach."

Nuance takes #1 scanning slot

Nuance Communications has been ranked number one in the worldwide document capture software market in a new study from the market research firm Harvey Spencer Associates (HSA). This marks the third consecutive year Nuance has placed as the leading global scanning and capture software vendor.

The report, called "The 2012-2013 Worldwide Market for Document Capture Software," found Nuance products captured 17 percent of the overall global document capture market in 2011 – leading all other companies. Nuance's acquisition of Equitrac in 2011 strengthened the value proposition of eCopy ShareScan, the world's best-selling document scanning and workflow solution for networked multifunction printers (MFPs), the report stated.

HSA research shows that the Ad Hoc Image market segment has grown due to more sophisticated channel

offerings driven by the increased use of networked MFPs in the enterprise. Nuance owns 37 percent market share in the Ad Hoc Image segment, more than four times the amount of its nearest competitor, and leads the competition with a 29 percent market share in Ad Hoc Transaction, defined as demand-based capture that is intended to be integrated into business processes.

Nuix winning run for IT exports

A win at the European Union EU Directorate General (DG) topped off another strong year of international success for Australian ediscovery and data investigation developer Nuix in 2012.

The EU Directorate General selected Nuix technology for its inspections at corporate premises. DG Competition chose Nuix for its ability to provide in-depth investigations across huge unstructured data sets in very short time frames using a small hardware footprint.

DG Competition investigates companies that may have breached competition rules through cartels or other anti-competitive practices.

It also examines proposed corporate mergers that may significantly reduce competition. These investigations can involve analysing corporate data onsite during surprise or announced inspections and at DG Competition's headquarters in Brussels.

Eddie Sheehy, CEO of Nuix, said, "Many organisations are using Nuix to proactively investigate their operations to ensure they comply with regulations – preferably before the regulators arrive at the door."

DG Competition joins a growing list of regulators worldwide that rely on Nuix for investigating and cross-referencing multiple-terabyte cases of digital evidence, including the Australian Securities and Investments Commission, Japan's Securities and Exchange Surveillance Commission, the United Kingdom Financial Services Authority and the United States Securities and Exchange Commission.

Kofax receives data extraction patent

Kofax has been issued a patent that covers technology to determine the validity of data extracted from documents by reverse matching the extracted data with information contained in an organisation's systems of record, such as an ERP system.

The technology was invented to automatically and correct erroneous or suspicious extracted data in high volumes of business transaction documents, including purchase orders, invoices and receiving information.

"Transactional documents are mainly designed for human readability. They are received in both paper and electronic formats and the layout and language within the documents differ vastly between parties, which makes the reverse matching capability extremely beneficial for ensuring accuracy and processing speed," stated Anthony Macciola, chief technology officer at Kofax.

The technology encompassed within this patent is currently being used within Kofax Transformation Modules for its ability to locate and match line items within invoices used in accounts payable automation solutions.

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Information overload

By Alex Carter

With the transition process in Afghanistan under way, the repatriation of records accumulated in the Middle East Area of Operations has become a focus for Australia's Defence Forces. Colonel Kath Stewart is leading the Defence Information Management Tiger Team, which is tackling the challenge head-on.

Imagine the quantity of administrative, equipment and logistics records generated by 1550 ADF personnel on continuous rotation to Afghanistan over 10 years. Add to that a decade's worth of operational records relating to missions, intelligence, planning, health, finance and communications, and you have some idea of the massive information challenge facing Defence as the transition to Afghan-led security in Uruzgun province continues over the next 12 to 14 months.

To take on this challenge and develop a solution, the Defence Information Management Tiger Team was formed in June 2012. The team, led by Colonel Kath Stewart, Director J6 - ICT Plans within the Chief Information Officer Group, is overseen by a steering committee headed by Major General Michael Milford, Head of ICT Operations, and Rear Admiral Stephen Gilmore, Deputy Chief of Joint Operations.

"The disposal and movement of records in environments such as the Middle East have risks associated," Colonel Stewart says.

"There is a risk to life and property if hard copy information was to be carried out whole instead of being properly managed and reduced in theatre, however, the legal requirements under the Archives Act and other legislation remain the same.

"With unit rotations, embedded staff, contractors and Defence civilians coming and going, there are vast amounts of digital records being generated on our ICT systems. Add to this the creation of Defence records on coalition systems and on other local area networks, as well as the huge accumulation of paper records stored on pallets and in shipping containers, then this makes for considerable planning and effort when making decisions about what can be destroyed in theatre and what must be brought back to Australia."

The quantity of records being held in theatre is diverse and difficult to measure accurately. It includes imagery records on detainee management, CCTV footage, video from unmanned aerial systems and individual helmet cams, threat assessments, weapons intelligence and counter intelligence reports, through to personnel administration and logistics records detailing maintenance and supply.

"These records need to be integrated with the information management network back in Australia," Colonel Stewart says.

With this goal in mind, the Tiger Team conducted a review of current policy, which included incorporating recent legislative changes to the Freedom of Information Act 1982, Archives Act 1983 and the Evidence Act 1995. The result will provide a solution for the retention, disposal and repatriation of operational records.

"This includes writing procedures for future operations and providing a digitisation solution in the form of high-speed scanners and laptop computers installed with the Defence mandated document and records management system, Objective," Colonel Stewart says.

However, the key component to the solution is the formulation of an Operations Records Authority.

"Records Authorities are legal instruments issued to Commonwealth Agencies by the National Archives of Australia under the Archives Act. They set out the legal requirements for keeping, destroying or transferring records," she says. To develop an Operations Records Authority, the Directorate of Records Management Policy (DRMP) has worked closely with the National Archives.

"This was a significant achievement," Colonel Stewart explains, "particularly as this was the first time a Commonwealth agency has ever been able to influence or re-design how Records Authorities are written."

The Operations Records Authority will help personnel in the field by providing them with the information they require to categorise records and to understand which records must be retained and which may be destroyed.

DRMP, in conjunction with the Tiger Team, is developing other tools to help with the disposal of low-value records and is developing Emergency Records Authorities which, if approved by National Archives, will allow for the early disposal of some specific record types the ADF has accumulated in huge quantities.

As part of the strategy to improve the storage and administration of records in theatre, specific training in informa-

With over 100,000 employees, both civilian and military located across the world, Defence generates vast amounts of records on multiple computer networks. It is currently the single biggest user of the Objective EDRMS in Australia with over 52,000 users. This will eventually grow to 65,000 when implementation is completed in 2013.

tion management will become a feature of force preparation training. Commanders, chief clerks and medical officers will receive higher levels of training because of the importance of the information they generate.

Specialised information management officers are also being sent to Afghanistan to advise commanders on information and records management policy and other legal issues regarding records freezes, and records standards and practices.

The build-up of operational information in the Middle East is not unique to Australia. Colonel Stewart says some coalition partners have a lot more troops and a lot more information than the ADF, "so we are all working together and coming up with policies that support each other".

These policies will include memorandums of understanding, which will allow nations to share greater amounts of information and significantly reduce the information management burden on all participants.

The repatriation of records in the Middle East has begun, but having it in a suitable form that can be more easily mapped to Defence's fixed networks for proper storage and sentencing was due to start at the beginning of 2013



Soldiers of the 7th Battalion Royal Australian Regiment Task Group on patrol in Uruzgan Province, Afghanistan.

IT innovation helps fight gangs

All across Australia, state governments have either introduced or are introducing laws to prevent criminal association. These have been popularly dubbed the Anti-Bikie laws, but they can be used to target members of any criminal organisation. But once you have the laws, how do you make them work? A police force in Long Beach California is using enterprise content management (ECM) technology from Laserfiche to successfully target the sinister Sureños, the largest gang in California with hundreds of thousands of members.

Gang injunction laws have been employed for more than 25 years in the US, but the system developed in Long Beach in tandem with Laserfiche is the first time the crucial documents needed to enforce the law have been provided to everyday patrol officers via web access.

The sale of drugs on the street is the primary source of revenue for Southern California gangs and the explosion of methamphetamine use has changed that enterprise dramatically.

Meth makes a lot of money for the gangs. As a result, competition for blocks and neighborhoods where meth sales are high has become fierce and totally dominated by the gangs. The Mexican Mafia leverages that competition to its advantage by rewarding prized turf to those who are most ruthless in furthering the gang's criminal enterprises.

Because it is easier to act with impunity in a community where you are less known—it's hard to be vicious when your grandmother lives around the corner—there is constant pressure on gangs to move into new territories.

The organisational sophistication of the Sureños and the constant flow of its members from one community to the next is what gave rise to the adoption of court-ordered gang injunctions targeting them. Injunctions can turn minor violations of civil law, such as public drunkenness or riding a bicycle on a sidewalk, into a criminal violation for the individuals or groups defined in the court order. They can also ban perfectly legal behaviours, like being found in the wrong crowd in a park at night, for those same individuals and groups.

It's like a restraining order, only it can apply to dozens, even hundreds of people at a time, barring them from engaging in anything the local legal system deems to be gang activity. Stopping such activity becomes a lot easier when it is criminal, which is why injunctions appeal to cities where gangs are a problem. Gangs need a prominent public presence to thrive and grow and injunctions can keep gangsters off the street.

Violators who conduct activities that are normally legal are charged with violating a court order, which can carry



Sureños use the number 13 which represents the thirteenth letter of the alphabet, the letter M, in order to pay allegiance to the Mexican Mafia. They identify with the colour blue which comes from days past when US prisons offered two standard colours of bandanas, blue and red.

a six-month jail sentence in California.

In Long Beach several such injunctions have been ordered by the court since 1992. They target certain gangs, and individual



members of those gangs, and the parts of town where they are known to operate. The Long Beach Police Department's Gang Suppression Section works with the city prosecutor's office to draw up the specifics of each injunction and then they make their case before a Los Angeles county judge who is asked to turn it into a court order.

However the increasingly complex operations of the Sureños has made determining who should get served with the court order, and then successfully arresting and prosecuting those violating it, a costly intelligence and administrative challenge to many L.A. County cities employing gang injunctions.

Reengineering Gang Injunctions

In 2010, Long Beach decided to re-engineer its injunctions and how they are enforced. Since so many of the gangs operating in the area were under the control of the Sureños, that organisation was enjoined in new injunctions. These were much broader than previous injunctions, targeting a group that encompassed hundreds. It was signed off by the Superior Court of the County of Los Angeles.

Under the latest injunctions, any member of any gang affiliated with the Sureños can be arrested and face three months jail time for a host of activities including being seen with known gang members, disobeying a 10 p.m.-

to-5 a.m. curfew, obstructing public right-of-ways, intimidation, gang signaling, and having spray paint or other graffiti tools. Since the approval of the Sureño injunctions, the number of suspected gangsters named in Long Beach injunctions has swelled to 600, with 400 having been served. New names are added to the injunction as new members are observed in the community.

Around the same time the Sureño injunctions were drafted, Long Beach P.D Detective Chris Zamora paid a visit to the L.B.P.D.'s information technology department.

Zamora, a 10-year veteran and student of Southern California's gang culture, knew these injunctions could be much more effective if every patrol officer in the department knew what the officers in the department's Gang Suppression Section knew about the area's gangs.

Previously, when a patrol officer wanted to make an arrest based on a gang injunction, the officer had to make numerous phone calls to headquarters to confirm the identity of an individual and whether that individual had been served with the injunction. It was a time-consuming task that resulted in missed opportunities to make arrests. Keeping gang records up to date also greatly complicated injunction enforcement.

"In previous days that important document was in somebody's desk or somebody's folder, probably not in alphabetical order. It was a mess. When we have over 200 gang members served on a single injunction the officer does not have time to mess around looking for the paperwork when he encounters a gang member in the street." said Detective Zamora.

Zamora asked the department's IT staff if it was possible to make all the information at headquarters available to officers on the street. The IT staff came back a few weeks later with an internet portal to a gang injunction data-

Finding the right records repository software was key to building this process

base built through a three-way integration involving the department's Laserfiche records repository, its Tiburon records management system and Crystal Reports, the business intelligence software which coordinates between the two databases.

Now officers can pull up photos of served gang members, maps of safety zones—those parts of the city subject to the injunction—a copy of the injunction and a hyperlink to the image of the proof of service form.

"That hyperlink is key," says Zamora. "It pulls up the image in Laserfiche of the signed notice of service showing that an individual has been served with the injunction. With that image on the sector car computer screen an officer can make an injunction arrest that's going to stand up in court."

That certainty has produced very real results. Long

(Continued over)



"You can't have patrol officers hop through different computer systems while you are deciding whether to make an arrest, it needs to be instantaneous," LBPD Gang Squad veteran Detective Chris Zamora.

IT innovation helps fight criminal gangs

(From previous page)

Beach's gang murder rate was cut in half the first year the new injunctions and software systems were in place and cut another 20 percent in 2011. The city's gang injunction program has been in place since 1992, but arrests enforcing it jumped from 35 in 2009, 140 in 2010, 180 in 2011 and 260 in 2012.

Those arrests have been very disruptive to the Sureño organisation at all levels, Zamora says. It is not just the street-level gangsters getting arrested, but the higher ups as well. With the Mexican Mafia increasingly running its street operations from behind prison walls, corrections officials have been intercepting intelligence on those operations and forward that to local police departments. In Long Beach that intelligence is passed on to the duty officers heading out on patrol each day.

Armed with that intelligence, the gang injunction factual database stored in Laserfiche and Tiburon, and the sweeping arrest powers provided by the injunction, L.B.P.D. patrol officers can then target the individuals involved in those operations and get them off the street all while on routine duty.

"We're using the very organisation that has made the Sureños so successful as a weapon to disrupt that organization," Zamora says. "With the range of criminal records we have and our ease of access to those records, any officer can use the injunction to quickly and easily get a gangster off the street if we have reports that they could be a threat to others. Our department is working with the smallest roster it has had in 10 years and yet last year violent crime was at its lowest level in 40 years."

The Technology Behind the Arrests

At the same time, Long Beach has avoided the community backlash that has hampered injunctive efforts in other Californian cities. The city of Orange recently lost a court ruling to the American Civil Liberties Union that weakens the injunction put in place there in 2010.

The ACLU has challenged gang injunctions in other cities with claims of arrests based on mistaken identity and racial profiling. Long Beach's new injunction program is less susceptible to such charges largely because of the technology behind it.

Long Beach gang experts used to draw up injunctions based on field investigation notes and their own knowledge of the territory. Now those injunctions, and who get named in them, are drawn up using maps and booking records, incident reports and individual arrest records which include pictures, tattoos and admissions of gang affiliation. All are stored digitally in the new records repository which makes them instantly available for cross reference and fact checking.

Finding the right records repository software was key to building this process, according to Braden Phillips the department's administration bureau chief. The records

repository software needed an open architecture to allow the integrations with the department's existing software systems. So in 2009 the City selected Laserfiche to replace its existing IBM FileNet and EMC Documentum systems in city records, police, and housing departments. "We selected Laserfiche to create more consistency, efficiency, and transparency, while saving the city thousands of dollars in equipment and maintenance fees," said Curtis Tani, Director of Technology Services for the City of Long Beach.

Laserfiche is now integrated with Tiburon and Crystal Reports. It now holds many of the records the department depends on to draft court injunctions with teeth. Draft injunctions are presented to Haubert's office, where they are vetted again. Nobody is subject to getting served with the injunction until he has been so screened, according to Haubert. The court's review and approval is another layer of oversight before the injunction becomes a court order and arrests are made.

Hourly updates

The gang injunction factual database is updated every hour with the names of those served, arrested or added to the injunction list. Each time this happens a new PDF is generated and placed in the Laserfiche folder accessed by cops on patrol so they have the latest up to date data.

"In the old days, if you happened to have associated with gang members, you might get served with the injunction because the police just assumed that you were in the gang," Haubert says.

"That doesn't happen anymore because we're using technology to better screen who gets served with the injunction. We're getting much better at targeting the right people."

And should a person feel he has been wrongly served with the injunction, he can appeal the city prosecutor's decision before the county court that authorised the injunction. "The vast majority of people who get served with the gang injunction do not try to dispute it or deny it," Haubert says. "They would not have been served if there wasn't substantial evidence to show they deserve to be included in the injunction, and through our new gang injunction database we can readily prove that. So those served with the injunction realise they have no basis to make a claim that they are not really an active gang member."

Oddly enough, even some gang members and potential gang members seem equally appreciative. The injunction can be looked upon as a law enforcement tool, but it also provides a level of cover for members looking to leave the gang life. It is a lot easier to avoid the gang life if you know you are likely to get arrested. At the same time, if you are in a gang, the injunction is making it a little easier to get out. It may not be an alternative to joining a gang, but it certainly provides a powerful incentive not to, and that's what the LBPd set out to accomplish.

Thanks to Jim McDonnell, chief of the Long Beach (California) Police Department.

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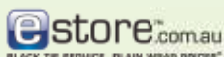
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Developing an Information Asset Register for effective data governance

By Alan D. Duncan

A significant aspect of effective Data Governance is about orchestrating the exchange of information between multiple parties; to facilitate (and arbitrate) a robust, repeatable approach to delivering content in context, in support of more effective and efficient business outcomes. But how do you do this if you don't know what data you've got, what state it's in, or who is responsible for it?

For over 10 years now, I've been advocating the idea of maintaining an Information Asset Register, as part of an enterprise-wide approach to managing Information as an Asset.

This approach goes beyond the systems and applications auditing process that takes place within IT departments. Rather, the Information Asset Register is about building up and maintaining a complete, reliable inventory of data holdings within the organisation, the different contexts within which the information is (or could be) used, and identification of the various interested parties – if you will, it's an index of "what's what, where's where and who's who".

The Register is then used as a tool for enabling more explicit and productive discussions about data between respective creator, collector and consumer parties.

Crucially, by acting as a catalyst for discussion between information stakeholders, this approach encourages more collaboration across functional boundaries, establishes points of contact for more proactive information sharing and breaks down any existing protectionism within information silos (an approach that a Public Sector colleague of mine refers to as "POIM" – as in "P*ss Off, It's Mine...").

It can be seen that this is therefore not a project – maintaining and publishing the Information Asset Register quickly becomes a key ongoing service provided by the Data Governance function.

This requires some incremental level of investment in

your Data Governance capability, if only to provide the resources and skills needed to enable the proactive brokering and facilitation of a data-oriented discussion.

(Some organisations will require higher levels of investment if basic Information Management practices and capabilities are not yet in place).

The approach isn't widespread yet, but some progressive government organisations have been taking the lead (notably the UK National Archives, Australian Commonwealth National Archives and Queensland Government CIO Office).

One challenge as I see it is that these organisations are taking an approach that is driven out of compliance and records-keeping requirements, rather than seeing Information Asset Management as a value-adding opportunity.

I'd argue that if the drivers were based on business improvement and outcome benefits (rather than "meet the basic minimum"), organisations adopting an Information Asset Management approach would start to see real transformational change, almost by stealth. (See also my blog post on the concept of Information as a Service.)

Anyway, the Information Asset Register is certainly an approach that I'm adopting within my Data Governance role at UNSW – time will tell whether it proves to be successful!

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Twitter: @Alan_D_Duncan

This article was first published on Alan's Data Governance blog, <http://informationaction.blogspot.com.au/>.

Alan will be running a workshop on the creation and use of the Information Asset Register at the Ark Group's Data Quality Asia Pacific Congress in March.



Australia's Department of Health and Ageing wants to bring its records from the pre Medicare era into the digital age, in a project that will scan over 40 million records for the period 1 July 1975 to 31 January 1984 presently held on microfiche.

The tender calls for scanning and digitising the microfiche content, as well as optical character recognition (OCR) and conversion to PDF format with both text and manual search-

Scanning the pre-Medicare era

ing.

The historical data on microfiche is still in use, however the use of microfiche readers to access the data is time consuming and imposes further wear and tear on the microfiche.

The department wants the historical data preserved, and its usability improved. The successful tenderer is expected to complete the project by 30 June 2013.

Metadata Technology North America Inc. (MTNA) has been awarded a contract by Statistics New Zealand for the delivery of its next generation classification management system.

Classifications, often referred to as code lists or value labels by statisticians, are a fundamental component of statistical data production, management, and analysis. Their standardisation and consistency are essential to ensure data comparability and harmonisation across datasets, time, topics, borders, or languages.

Effectively maintaining and sharing such information at the international, national, institutional, or departmental levels presents significant challenges. As a result, this is often performed in isolation, leading to duplication of efforts and inconsistencies.

MTNA says its solution will take an innovative approach by providing a platform for collaboratively managing classifications, enable functionality such as the capturing changes over time or cross-classification mappings, and provide standard web services and interfaces for interacting with external systems.

The underlying information model will be concept driven and align on broadly accepted metadata specifications and best practices such as the Data Documentation Initiative

Classification Management at Statistics NZ

Cloud vision for public data analysis

(DDI), Statistical Data and Metadata Exchange standard (SDMX), Neuchatel Terminology, or the Simple Knowledge Organization System (SKOS).

Web based user interfaces will be designed for managers, institutional, and public users, to maximize accessibility.

The project is due for completion in second quarter of 2014. As part of the agreement, the software will be licensed in perpetuity to Statistics

New Zealand.

Free licenses will also be extended to national statistical agencies in the 22 member countries of the Secretariat of the Pacific Community (SPC). It is further anticipated for the platform to become available for general licensing in 2014.

This classification management system is a core component of MTNA's long term vision of delivering global cloud based environments for the management, publication, access, and analysis of statistical data.

It says flexible and standard based classifications management tools, enabling sharing information across institutions and borders, would greatly facilitate single point of maintenance and foster reuse, leading to more consistent and comparable data, in turn supporting amongst others open government



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Its all about the data: Stupid!

By Clive Gold

You might not realise it, but Big Data is changing the way we live, work and play.

There is a reason you saw that advert on the webpage you visited and the bank sent you that particular offer. Big Data is not just about advertising and selling - its impact is far broader. Have you purchased a book from Amazon and noticed how relevant most of the suggested books are to you? Perhaps you are wondering how LinkedIn seems to be quite accurate in suggesting people that you might know?

These organisations have been the pioneers in the field of Big Data. By their very nature they have vast amounts of information, which they use to improve their operations, understand their customers' behaviour and sentiment, and uncover trends to drive new product development.

But there is far more to Big Data than facilitating commercial gain. Renowned American photographer Rick Smolan, creator of books such as '*A day in the life of Australia*' and '*24 Hours in Cyberspace*', trained his sights on Big Data for his latest project, '*The Human Face of Big Data*', (humanfaceof-bigdata.com). Rick's premise was that Big Data is already changing the face of humanity – for the better. His book documents over a hundred fascinating examples of this, from projects all around the world, where data is making a positive impact on humanity.

Today, many organisations are looking at how they can



gain a competitive advantage by using the data they have and the data they can get access to. We live in an information economy, so we can all consider ourselves to be knowledge workers. Our work, or the value of what we do, comes from creating, interacting, and deciding.

The question, 'Is there data which would help you be more creative, improve the interactions you have with

(Continued on page 16)



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The world we live in today is caught in a frenzy over the term big data. The usage of these two words in any context draws attention from executives to data scientists and business users in organisations of any size. While there are many definitions floating around for the term, here is a simple definition for this discussion: Big data can be defined as data that cannot be processed using traditional data processing techniques due to its characteristics and complexity.

What constitutes the data that is classified as big data? Let us first explore the different categories of big data:

Unstructured data – Text, videos, audio and images.

Semi-structured data – Emails, earnings reports, spreadsheets, software modules.

Structured data – Sensor data, machine data and mathematical model outputs.

If you take a step back and closely observe those categories of data, there are a few common characteristics that need to be understood by the data architecture and the business teams:

Volume – Any of these data categories are, by default, large in volume and variable in size.

Variety – The data can be available in a variety of formats, languages and sources.

Ambiguity – The data can contain metadata about itself or have no metadata.

Quality – The quality of data in the unstructured and semi-structured categories is unreliable.

These characteristics make the acquisition and processing of big data an extremely complex activity. The biggest threat in this process is to prove the associated value from integrating big data. What does a big data program look like? What are the differences in such a program from any other data management program? Why do you need to pay attention to this initiative? Today, all of these questions are arising from teams within enterprises. But beyond all of these questions lies a hidden area that needs to be a pillar for the big data initiative: data governance. Data governance for big data is a large and evolving subject and each enterprise will treat the subject according to its requirements.

Today, big data programs in organisations are tied to exploring the potential of

Data Governance for Big Data

a platform, such as Hadoop, and the associated business case includes social media data integration, some weblog parsing and, in other cases, machine learning exploration. The underlying value of these exercises is quantified in ROI of sales lift, market share and customer centricity, but the critical path is understanding the data and its relevancy to the business. Before you put a business case document together, spend some time trying to understand the data and its content, in order to comprehend the value that can be derived. This is where the data governance aspect comes into play.

Data governance concepts as applied to traditional data warehousing and business intelligence include:

- Stewardship
- Information governance
- Data definition and usage standards
- Master data management
- Metadata management
- Data lifecycle management
- Risk and cost containment

These same concepts can be applied to the world of big data, with some tweaks:

Stewardship – Big data needs strong stewardship from inception to delivery and beyond. In any enterprise, business users know the data best from a utilization perspective and they should be the stakeholders for stewardship of data that is relevant to their needs. For example, Twitter data can help marketing and competitive research. – In that case, who is the primary data steward? Sensor data and machine data, on the other hand, needs to be managed by a team of data scientists who can be aligned with a business steward, but they need to hold joint custody of the data. Bottom line is that, without strong advocacy and support, an enterprise will not have success with big data.

Information governance – Big data, if not governed with the right approach to managing information within the enterprise, can wreak havoc. The critical stakeholders in this initiative are architects, system administrators and data center administrators. Governance in this area

(Continued on page 16)

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Data Governance for Big Data

will include the acquisition, landing, processing requirements, infrastructure management, storage and security of big data. Each of these aspects needs to be defined clearly as a part of the initial journey into big data.

Data definition and usage standards – The biggest threat with big data is the definition of the content and how to consume it. For instance, a tweet like, “@johndoe #united #fail bad svc. long waits. faulty planes. lousy mgmt. never fly again,” can be processed in multiple ways. You need to define in a well-defined standard and structure the data within the tweet and how to format and process it for each division of the enterprise that will share this data. The consumption layer will include the use of MDM and metadata programs.

Master data management – With big data, there is no net new master data to be added to the “golden record.” Big data is an analytical consumer of the MDM outputs, where the keys from the MDM program can be used to parse the content and form associations of big data into the enterprise. These processes are complex and require multiple iterations of processing before you can derive a finite value.

Metadata management – With big data, there is metadata associated with the object in most cases but there is not content-related metadata. To process metadata for the content and derive the appropriate contexts for the data, we can use taxonomies, semantic libraries and ontologies. These data elements may be new to the enterprise and need to be treated as lookup data and reference data for processing, and maintained as such. The benefit of this processing technique is very straightforward:

It improves the data quality of big data.

Data lifecycle management – Big data needs lifecycle management principles too. Enterprises must to define the length of time for which the data is needed online and then define the archiving and storage strategies for this data post-consumption. Even platforms like Hadoop provide a mechanism for reducing the burden of a large volume of data being in the “namenode.”

Risk and cost containment – While big data can benefit enterprises, there are hidden risks in the acquisition and processing of big data, which can be mitigated by implementing a governance process for infrastructure, process and consumption of the data. The biggest risk that we see unfolding is the incorrect association of the data and its subsequent processing, which can be avoided with stewardship and standards.

As we can infer from this brief discussion, data governance plays an extremely important role in big data and its management. If implemented early on and in the right organisational process, enterprises will reap rewards with big data processing and reduce any visible risk associated with such a program from a cost perspective. This is the beginning of a long journey for many organisations, and following a known path will bring improved adoption and success in the big data world.

Krish Krishnan is the president of Sixth Sense Advisors Inc., a Chicago-based company providing Independent analyst services in big data, data warehousing and business intelligence, and serves as Senior Vice President of Innovation for Chicago Business Intelligence Group (CBIG), a consulting firm focusing on data warehousing and business intelligence. Reach Krish at krish.krishnan@cbigconsulting.com.

Its all about the data: Stupid!

your clients/customers, or support the decisions you make?’ can be answered in the affirmative by most organisations. Big Data analytics technology allows those organisations to harness their data to achieve those aims. With this in mind, organisations are looking at how they can provide data to their customer-facing staff in order to make those interactions more personal and more valuable to both parties. They are looking at providing decision makers with the information that will support and enhance their decisions, as a strategic plan is better when it’s derived from real fact and trends.

The issue is there is way too much data for the human mind to cope with. IDC’s Digital Universe study, which was released towards the end of last year, found that we create seven Petabytes per day, with practically all of it unstructured. To make sense of all this data, new technologies and techniques have being developed. The need for this is due to the huge volume and variety of this data. Where ‘traditional’ technologies were developed in a structured world, looking to record transactions, they are limited, and trying to force this work onto them results in massive costs and extreme frustration.

To solve the size requirement, the technologies are built as scale-up. Scale-up systems are built so that they are modular and adding each node increases speed and size almost linearly. (For example, a scale out storage systems can scale out to tens of Petabytes yet still be presented

and managed as a one file-system – think a Petabyte thumb drive!) The ‘variety’ discussion is a little more complex. In a traditional relational database the outputs are defined and the data structure is analysed before the database is built. In the Big Data world, there is value in capturing as much fine-grain data as practical. This means the technology must enable massive scale and still perform ‘queries’ or ‘analytics’ extremely rapidly, or in real-time, for it to be useful. (Imagine if Amazon sent you a recommendation a month later - would you take any notice?) Also given that the process is one of discovery, the analytics database has to be ‘pliable’.

This is a matter of horses for courses, as organisations who have moved from ‘traditional’ technologies to ‘Big Data’ technologies, find that at scale they can do 10x more work, for about 10x less cost!

Lastly, the way this work is done is very different. Unlike the ‘waterfall’ process described above, this is an iterative and agile process. The analyst or data-scientist is investigating and learning all the time. They perform a guided discovery in an attempt to uncover key insights to add value to their organisation. This is the key to Big Data – utilising the data at your disposal to improve the value that you create.

Clive Gold is Marketing CTO for EMC Corporation Australia New Zealand. He is presenting at the Big Data 2013 conference in Sydney this March on how big data is changing humanity as we know it

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Esker forecast: Cloudy but fine

Eric Bussy is VP Product Management & Marketing at Esker, one of the world's leading providers of document automation solutions for inbound and outbound processes ranging from customer and supplier invoices, dispatch notes, sales orders and purchase orders to remittance advices. As the man responsible for the development of products, services and solutions at the multinational, IDM asked him what it's like to steer a course through such a diverse landscape today where companies need everything from cloud based data exchange to physical delivery by post and fax, via both on-premise and cloud platforms.

IDM: Esker has a long background in document processing, can you give me a bit of a timeline for the company:

EB: Esker comes from outbound document management, but a bit over eight years ago we entered into the inbound document processing arena with sales order processing as the first process.

From there we naturally wanted to cover the cash conversion cycle, so accounts payable (AP) Automation was a place we needed to go.

For both processes we started with on-premise solutions using our Esker DeliveryWare server and made our first move to cloud in 2005. Right now the company is geared towards the cloud, it's more than a trend it's just happening everywhere.

IDM: There is a whole range of inbound and outbound document automation solutions available in the market today. What are some areas where you think Esker has a marked difference?

EB: One of the ways our technology for AP automation is different from other players in that the workflow is outside SAP rather than being inside SAP.

We do it this way because there are many companies that operate multiple ERP platforms, they might have SAP and JD Edwards and others so having the workflow inside SAP will not fly for them.

They also want to standardise their processes outside of the ERP so this increases productivity for all back office processes and decrease the complexity associated with ERP upgrades and other integration issues.

Being outside of SAP opens us to a wider market, from tier 1 companies to the SMB space, where productivity gains are also important in these challenging economic times.



"Making document process automation solutions available to a wider market has been our strategy. The cloud enables that." - Eric Bussy, Esker

IDM: Esker is well known for specialising in automated sales order processing solutions for SAP systems. Is that your primary focus?

EB: 50% of our customers run SAP with the rest runs Oracle, Microsoft and a range of other ERP solutions. The cloud is allowing us to address the needs of companies of any size, with as little as 1,000 invoices a month to process. The reduction in processing cost is one reason we can offer solutions that make sense for medium-sized organisations, but even more important is the fact that the investment in configuration that's necessary is falling considerably. Many organisations are happy with an out of the box solution that handles 90% of their workflow needs and so they don't need to spend months with expensive consultants.

Salesforce has shown the way in many respects. In days past an Oracle CRM user who just wanted to get a dashboard might require 3-4 hours with a consultant at \$200 per hour. Then you switch to Salesforce and you can create a dozen yourself in an hour. Not requiring a consultancy firm to configure a solution is the secret, that's what made salesforce.com such a success. Making document process automation solutions available to a wider market has been our strategy. The cloud enables that.

IDM: Salesforce and other CRM providers have certainly succeeded in their cloud offerings, would you say ERP and document processing are at the same stage of acceptance of cloud strategies?

EB: We see cloud-based business applications and services as the way of the future, and it's important to Esker to continue establishing itself as the leader in this growing field.

However it's still early days and CRM on demand is a lot more popular than ERP on demand. In Australia we would estimate that more than 90% of ERP deployments are on-premise, although there are lots of conversations about the cloud. Things will change rapidly.

Customers want to go with the solution that will give them the maximum benefits in the shortest time possible. Esker On Demand provides this.

IDM: Companies evaluating an invoice processing solution traditionally make the choice between in-house deployment or a business process outsourcer (BPO). How does Esker DeliveryWare fit into that competitive landscape?

EB: We are often competing with BPOs and the main concern for companies there is security and the loss of visibility of documents as they process through an externally managed workflow. Cloud computing on the other hand has the same ability to offload the technical complexity and infrastructure while you are still hands-on with your documents.

It also gives you the advantage of scalability so cloud computing is just becoming a natural way for CFOs.

But Esker is also happy to partner with BPOs in providing its DeliveryWare cloud solution as the processing platform, which scales much better than any on-premise platform they can implement themselves. Traditionally the BPO has to invest millions of dollars in technologies for scanning, OCR and workflow and make different technologies work together in their data centre. They then have

to manage the full complexity of technology integration, maintenance and lifecycle as versions change.

They are not just doing BPO they are doing IT integration. Instead they can use our cloud to provide OCR, workflow and archiving, the three main blocks of an AP automation solution.

IDM: What is Esker's view on the future of document exchange networks?

MB: We believe that open inter-operable networks are an important part of the future and that is on our roadmap. We have millions of organisations already sending and receiving documents through our global platform. For instance Toshiba is using Esker on Demand for accounts receivable in the US and sending out documents to 150,000+ of its customers.

We do have some instances where we are handling both the send and receive sides. At both ends we have the electronic data and yet it still goes out by paper and comes in at the other side through a scanner. AR is on one side and AP is on the other, we are building a bridge and eventually it will meet in the middle.

IDM: Where have the main improvements been in document processing technology, and where is the major focus for Esker?

EB: Document process automation technology is progressing steadily. The technology to capture from paper using OCR is improving little by little, we use both the Nuance and ABBY engines, as each has specific language advantages. It's also true that production scanners are getting better, smaller and less expensive

But I see the major improvement is in infrastructure as a service, maintaining a data centre is still a lot of work which we can remove from the equation on the customer side.

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Dan Holme, governance thought leader from USA has spent the last years visiting hundreds of organisations, large and small, in every vertical and in every corner of globe. Dan shares his “lessons learned in the real world” thought several sessions, including a one day pre-conference workshop dedicated to

Governance and SharePoint. Join Dan for keynote session : **Brave New Hybrid World: What SharePoint 2013 Really Means to You**

Randy Williams works directly with enterprise customers to deliver and implement solutions that help unleash SharePoint's full business potential. As an author and SharePoint expert, Randy helps organisations around the globe maximise their SharePoint investment. Randy will speak on a number of topics at this event including the new APP model in SharePoint 2013, and the what, why and how of integrating SharePoint and Exchange.



Michael Noel has travelled to all seven continents and over 140 countries to spread SharePoint joy. As an internationally recognised technology expert and bestselling author, Michael will share his real-world expertise. Join Michael to gain critical insight into successfully installing and executing a trouble-free upgrade to SharePoint 2013.

Branding and Design Experts join us from the USA – **Randy Drisgill** and **John Ross** (both SharePoint 911 MVP's) with Rackspace are some of the foremost experts in design, branding, public websites and come down under to share their experiences

Also presenting are New Zealand and Australian SharePoint leaders and Microsoft MVP (Microsoft awarded Most Valuable professionals) – **Mark Rhodes, Gavin Barron, Alan Marshall, Debbie Ireland, Elaine Van Bergen and Sezai Komur**.

This year also introduces a few key business speakers, including **James Robertson**, from Step Two Designs, who is a recognised author and international expert on intranets. You will get to enjoy some great Case Study sessions from customers who will share their own experiences, trials and tribulations with both 2010 and 2013 versions of SharePoint.

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Kathmandu's trek to a SharePoint DAM

Getting kitted out for a hiking or camping adventure is no longer a matter of just throwing on a duffel coat and slipping into a pair of disposal store army boots. Specialist suppliers such as Kathmandu have carved a formidable presence in bringing the type of clothing and equipment used for travel and adventure up to date with high tech new quick-drying materials

From its first store which opened in Hardware Lane in central Melbourne in 1987, Kathmandu quickly followed with its first New Zealand store in Christchurch in 1991. It now has over a hundred stores, distribution centres and offices spread throughout Australia, New Zealand and the UK, with around 200 backoffice staff. The range of clothing and accessories available from Kathmandu is now vast, and for each year's new range the marketing team travel globally to photograph the gear being modelled in the world's more exotic outdoor locations. By 2011 this was presenting Kathmandu CIO Grant Taylor with a problem.

"We have compiled a lot of imagery and video and were beginning to wonder how to store it so that it would be easier to find it again when we need it."

Taylor identified the need to deploy a dedicated digital asset management (DAM) system with a disciplined approach to applying specific metadata to stored images. As Kathmandu was using windows network folders for storage of images and documents, the DAM platform would also represent the company's first step into looking at a more structured content management environment.

Taylor explored a number of dedicated DAM platforms, however after engaging with NZ SharePoint solutions provider InterGen began to look at moving ahead with a

solution that integrated with SharePoint.

Early in 2012 InterGen approached DataBasics, Australian distributor of Equilibrium's MediaRich

ECM for SharePoint, with the details of the project they were engaged with for Kathmandu. This led to the creation of an in-house trial system being created in the offices of InterGen in Christchurch which was presented to Kathmandu.

"The immediate need was in the marketing department for digital asset management but Kathmandu has a business vision to move towards having document management as well," said, Julian Brown, Senior Technical Consultant at InterGen.

"So being tied to the Microsoft stack SharePoint made sense for that as they already had the licenses under their enterprise agreement."

InterGen and DataBasics technical teams worked together to refine the details of the solution that best fitted the needs of Kathmandu, and present a full proof of concept in a working environment after seven weeks of development and analysis. The solution went live at the end of August 2012. Kathmandu acquired the MediaRich for SharePoint SMB license with additions for extranet access plus staging and development environments.

"We worked closely with the Kathmandu marketing team to learn how images and data were being searched and accessed. When we presented the proof of concept it was a great success, they were quite impressed with the functionality we were able to deliver," said Brown

Over 500GB of marketing images and video were transferred from file storage to MediaRich ECM for SharePoint in a data centre in Christchurch. Growth is expected to be in the order of 200-300GB per annum.

By structuring the media content to live in individual site collections that do not exceed 300GB each, InterGen was able to keep the SQL database clean and agile and remove the need to go to external BLOB storage.

"It's meant a bit of extra work for marketing as they can't search on images unless they've been tagged and imported into the DAM. But the ease of searching just cannot be compared. Previously they would have all the images from a particular photo shoot in the USA arranged in a single folder and they would have had to trawl through hundreds of images to find the one they wanted," said Taylor.

"During the bulk uploading to MediaRich we could apply core metadata across common categories, to apply a tag across 1000 images really fast. Once we had established the MediaRich DAM for marketing photos and videos we began to think about what else we could use it for, so we are now also storing product images."

Media agencies that Kathmandu works with require different resolution copies of these images and MediaRich provides them with the ability to access that image in any size they want.

"It's been very much the tip of the iceberg as a first phase for us. As we move down a Microsoft path with other systems product information will be able to integrate quite natively within our digital asset management (DAM) system," said Taylor.

Images on the Kathmandu website presently live in a Magento Web CMS although this may change going forward.

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SharePoint 2010
Equilibrium MediaRich DAM

NZ agency walks on with the SharePoint cloud

A government organisation in New Zealand has overcome the challenge of moving its SharePoint deployment to the cloud while remaining in step with the tough legislative guidelines of the NZ Public Records Act. Set up in 2008, the New Zealand Walking Access Commission (the Commission) has deployed a hosted SharePoint solution with a records management overlay delivered by Information Leadership (NZ) and its iWorkPlace product.

The Commission is a small Crown Entity that plays an important role enhancing access to public walkways for New Zealanders. With seven staff based at the corporate office in Wellington and eight regional advisors located around the country, the organisation needed a manageable IT solution that would allow better collaboration between team members, improved security and a more organised information management system, while ensuring that it was compliant with the Public Records Act (PRA).

The Commission has outsourced its IT requirements and was using Microsoft SharePoint for managing its data from the regional advisors, but as the organisation developed so too did its need for more specialised tools and greater customisation, particularly for managing public enquiries.

The solution supplied by Information Leadership broke new ground in New Zealand by becoming the first locally-hosted cloud solution to support PRA compliance. Working in tandem with Auckland-based IT infrastructure company Appserv, which supplied the infrastructure and hosting capabilities, Information Leadership has provided record-keeping as well as productivity enhancements on a SharePoint base. The Commission maintained its email and file storage on internal servers

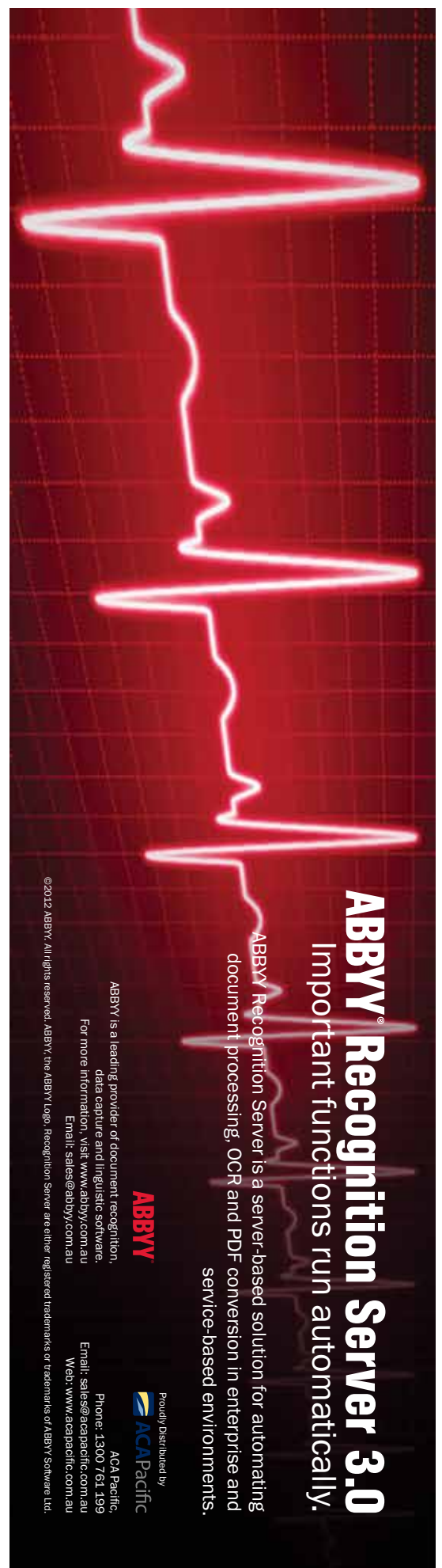
"We're excited by this development because it shows that Government agencies can operate on the cloud and still meet public records requirements," says Information Leadership Director Sarah Heal.

Using the iWorkPlace product, Information Leadership added several key additional features and functionality into the Commission's solution. "Information Leadership put a whole lot of things together to make life easier in-house and for our regional advisors," explains New Zealand Walking Access Commission Corporate Services Manager Helen Barker. "We had SharePoint before, but we didn't have all of the smart features that they applied to it."

Some of the features that have greatly improved the Commission's day to day processing of information include the Colligo email product, which has made filing and searching for emails much easier, and improvements in how filing is displayed, making it easier to navigate information. Collaboration between the Commission's team was another issue that needed to be addressed. Previously, regional advisors could not access relevant files and resources based in the corporate office, which made collaboration difficult and meant that some files were saved in two places. By applying security access levels to data, based on the user's profile, Information Leadership was able to facilitate access to appropriate corporate information relevant to their work.

The immediate benefits of the cloud solution are clear: improved collaboration between corporate staff and regional contractors and better data security. These features have greatly benefited information flow between the Commission's team, bringing productivity and efficiency improvements.

"The Commission needed better management of their enquiries," says Helen Barker, "we now have automated recording of our enquiries and the ability to sort and display them, which has made our management much easier and saved us a lot of time— it's a great feature."



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SharePoint's flexibility requires careful use of e-discovery protocols

By Mark Gerow, Kevin Moore, and Matthew Kesner

As discoverable content continues to grow at an accelerating rate, much of it has found its way into Microsoft SharePoint. SharePoint's collaboration tools, its flexible management of documents and other data, and tight integration with Microsoft's Office suite has spurred its wide adoption in the legal industry. But SharePoint's flexibility also presents challenges, both for organisations that need to manage data contained in SharePoint sites, and for law firms tasked with executing sound electronic data discovery (EDD) methods.

For users, the central question is how to store sufficient content to meet the needs of the business, while minimizing the amount of discoverable content. For EDD, the central question is how to efficiently extract and analyse all relevant content.

When it comes to EDD, electronic information management and legal records management (LRM) are tightly intertwined. The guiding principle of EIM is to manage and retain content to meet the needs of the business or applicable legal requirements. The guiding principle of LRM is to know where every relevant document and piece of data relating to a client matter is housed, so it may be retained as long as necessary — and destroyed or transferred back to the client when appropriate or required.

To successfully support either function in SharePoint, content must be appropriately tagged with metadata, as is done in traditional legal document management systems. The challenge with SharePoint is in its flexibility — each user can devise a unique scheme for tagging content with metadata, making it difficult to treat all content consistently.

Many users do not realise that SharePoint has tools that enforce consistent metadata tagging and records management. Content Types enables the consistent application of metadata and validation across multiple sites. The Records Center has been enhanced in SharePoint 2010. Together, these two features can form the basis for a firm-wide content tagging and records management policy. The dual goals: retain enough of SharePoint's flexibility to keep it an attractive platform for collaboration, while providing sufficient consistency to effectively manage content throughout its entire lifecycle.

Lifecycle content management requires addressing the question of data disposal. There are significant efficiency and risk-management benefits to systematically winnowing data. Organisations can become more efficient in day-to-day operations. Less data also means lower costs of collection, processing, and review. Another ben-



efit: potential litigants can more quickly get a sense of the strength of a defense, minimising litigation fees and costs.

Unlike a typical document management system, which permanently deletes documents and associated metadata when requested by authorised users, SharePoint moves that data to a recycle bin. This helps the user/administrator recover content if a deletion was in error. But it also means that content the user assumes was destroyed may be collectible and discoverable for 60 or more days after deletion — unless that content was permanently deleted by a SharePoint administrator.

Another risk is user-maintained personal sites (My Sites) that can contain documents and other data. Absent clear governance policies, users may accumulate gigabytes of content without any formal plan for its destruction. Consider establishing day-to-day policies, and records management and enforcement rules and protocols, to purge stale content. Automated age-based disposition rules, and storage limits, may be appropriate, accompanied by periodic warnings to users. Users can be "highly encouraged" (word choice and tone depending on firm culture) to move items requiring long-term retention to SharePoint areas that are exempt from retention policies, such as a practice group or department library.

Firms should anticipate situations when they (or their SharePoint-using clients) may be subject to e-discovery. My Sites should be added to checklists of repositories to be considered.

Another challenge with SharePoint is its flexibility with metadata. Each practice group, department, or user can potentially assign different and inconsistent metadata to files. Given the cooperation of the source organisation, it may be possible to create a "map" of metadata synonyms across various libraries and lists. For example, one SharePoint document library may contain the field "Client Number" while another uses the field name "Client #."

Some situations may require building a map of the metadata field names, so you may need to obtain the list of metadata fields for thousands of lists or libraries across an organisation's SharePoint implementation. Fortunately,

ly, SharePoint provides an application programming interface that supports this task. You'll likely need to program custom reports so that reviewers can identify all synonyms.

As with a DMS, SharePoint stores documents and their metadata separately. If files are copied out of SharePoint, by dragging them from "Explorer View" into a folder on a local or networked hard drive, the metadata will be left behind. To extract a complete set of content, including versions and metadata, one of two methods may be used: 1) obtain a complete copy of the SharePoint content database(s) and import into another SharePoint instance maintained by the firm performing the discovery; 2) extract the documents and metadata to the file system using a third-party or custom tool that retains associated metadata and maps it to associated documents.

Assuming access to the original or full copy of a SharePoint repository, the built-in SharePoint search may be used to discover data — if content is tagged consistently with metadata. Once a search index is created that includes the document text as well as metadata, a variety of full-text or keyword searches based on specific metadata fields can be used to find the data.

While search-based discovery can be powerful, SharePoint hides duplicates in search results by default. It is best not to rely on SharePoint search as the sole EDD tool, but use it in conjunction with other software once likely avenues for detailed analysis are identified. In addition to SharePoint's native search, many third-party tools can help perform collection, preservation, and analysis of SharePoint content. When selecting software, here are basic questions to ask:

- » Does it require that an agent be installed on the SharePoint servers? If yes, the party performing EDD will need administrative privileges (or support).
- » Does it rely on native SharePoint search, a proprietary search, or both? SharePoint's native search was not designed with e-discovery in mind.
- » What metadata can the tool use and collect? The ideal tool should be able to process all types of metadata that SharePoint can attach to documents and other content.
- » What export formats are supported: EDRM XML, CSV, XLS, PDF, or proprietary? Support for standard review formats means there will be a wider selection of additional review tools to augment the built-in capabilities.
- » Does an export require a secondary SharePoint server for review? For large collections, it may be costly and resource-intensive to build a second SharePoint farm.

To tame your SharePoint beast, consider implementing a lifecycle governance policy — as well as a firmwide metadata standard that ensures all information stored in SharePoint has a basic set of data useable for records management, and, when appropriate, content destruction. This will help your firm shepherd data through its lifecycle and ultimate demise, reducing the risk that the firm will be forced to react if those documents and data become subject to discovery. For collection and review of SharePoint content, understand its architectural characteristics, so you can successfully extract and analyse content in a technologically sound and legally defensible manner. Once that baseline knowledge and skill sets are in place, a combination of third-party tools and custom programming may be used to reliably plumb the depths of any SharePoint repository.

Matthew Kesner (CIO), Kevin Moore (IT director), and Mark Gerow (director of applications and business) are with Mountain View, California law firm Fenwick & West. Reprinted with permission from the December 2012 edition of Law Technology News magazine.



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Sharepoint is a journey not a destination

By Samuel Conway

There can be no doubt that SharePoint has increased the types of solutions available to SME's. It provides them with a playground to create a number of solutions to address business issues such as document management, collaboration, reporting and forms etc. SharePoint online solutions have opened up what was once the domain of only larger organisations with teams of business and IT analysts. SharePoint is however challenging the perception on why you buy software in the first place.

One of the the statements that I have been constantly reminding companies of is that Sharepoint is a journey not a destination. While it can be designed to address the immediate needs its evolution within the organisation shouldn't stop there. Sharepoint isn't a simple executable that can be fired up to solve a particular pain point; its deployment needs to be thought of more holistically within the organisation.

Hence it is really starting to challenge how companies think about other systems that they either have in their company already or are about to purchase. A classic example is an SME I visited recently, that have the foundation edition of SharePoint, that was setup by their IT provider and they have been experimenting with it over the last few months.

As usual when it came to the IT infrastructure setup of SharePoint they had no issues getting that done. However when they asked what does SharePoint do they were met with a few generic responses around it being a document management system and a communication portal, and provided a very generic 15 minutes demonstration.

So they battled on and discovered a document library and then began to replicate what they already had on their windows file server. After a few months of hard work it dawned on them that they were falling into the same trap of creating chaos, replicating their old file folder structure.

As they didn't possess the system architecture skills in-house to put SharePoint to best use, they investigated the purchase of another system to help them meet their specific accreditation and document management requirements.

So where is the revelation here? This is a pretty common story, people/organisations not understanding the scope or capability of the products that they have purchased and wanting a quick fix rather than a long-term sustainable solution.

If you research the SharePoint journey on the web, you get lots of information about turning the initial deployment into broad adoption and then into a business solution. But what many organisations don't seem to understand is that it shouldn't stop there and making a SharePoint system sustainable within an organisation is



not set and forget. Of course there is initial adoption and then business solution but this neglects the sustained cultural change, constant re assessment and continuous improvement to make the system sustainable.

The only way to give your SharePoint implementation a fighting chance is to have it supported by one or many "Sharepoint Champions" within the business. The roles of these champions are to continue to promote the best use of this technology within the corporate governance strategy, but above all else take ownership of the sustainability of the system moving forward.

This is however beginning to challenge what skill sets are required within an organisation, because to manage and maintain a SharePoint system and continue to evolve it, is a multi-diverse skill set that an organisation may not have.

Hence when embarking on the SharePoint journey as an SME ask yourself these questions

- Holistically what do I want SharePoint to achieve for this business? Not just address what the company perceives as our pain points. (Investigate how other organisations are using SharePoint)
- Design a corporate governance strategy that takes into consideration your future system needs.
- Will the system be cloud or server based?
- Who within the organisation is going to be the champion(s).
- Make the definition between using a SharePoint consultant and contractor
- What methods and form of assessment are we going to use to ensure that Sharepoint continues to be a cutting edge solution and not just another IT system that we eventually replace?
- How will you drive continued cultural adoption and change?

The amount of value that can be derived through SharePoint is only limited by the system design, so unless you design the system around the business case and then apply the technology solution it will never meet your business needs.



Samuel Conway is managing director of SharePoint solutions provider Business Process Visualisation Australia (BPVA). Email him at sconway@bpva.com.au

Since the release of Office 2013 and SharePoint 2013, a cloud of confusion has been swirling around what SkyDrive is so I thought I would take this opportunity to clear the air about SkyDrive and the differences between the product versions.

SkyDrive on Live.com

If you have a hotmail.com, live.com or outlook.com email account then you already have a SkyDrive of your own to store your personal files in the cloud. This is one of the free services provided by Microsoft, with 7GB free storage (or up to a whopping 25 GB for long-term SkyDrive users) you have plenty of space to store your own files in the cloud. Like other online storage services such as DropBox or Box.net you can choose to purchase additional storage if required, with costs being considerably cheaper than its competitors.

You can treat your SkyDrive as an online storage location to store your files and retrieve them from anywhere that you have an internet connection available. You can use your SkyDrive to share files and folders with anyone else who has a live account.

If you have a new Windows smart phone you will also find that it is integrated with your SkyDrive on Live.com and you can store your pictures online directly from your phone.

SkyDrive provides the ability to replicate your files to one or more PCs, allowing you to access your files directly from your computer, but you also have the additional benefit of having these files automatically replicated to the cloud to ensure you have a cloud based backup. If you are interested in synchronising your files from your SkyDrive to your PCs then check out <http://windows.microsoft.com/en-AU/skydrive/download>

What's all this other stuff then?

With the release of Microsoft Office 2013 and SharePoint 2013 confusion has arisen from the fact that SharePoint now has a SkyDrive and Office 2013 also ships an application called SkyDrive Pro.

SkyDrive On-Premise

If you are lucky enough to have SharePoint 2013 running at work then you will find in your My Site that there is another SkyDrive, which will also allow you to share your favourite

Microsoft SkyDrive



By James
Milne

Piecing together the puzzle

pictures, documents and files with anyone within your organisation. You can think of the SkyDrive in your MySite as your "professional" or "work" SkyDrive, because when you save files here, the files will be stored on your corporate servers and not in the cloud. Due to the fact that these files are stored on your corporate network you will be able to share your files with anyone inside your company.

SkyDrive on Office 365

Like the on-premise version of SharePoint 2013, Office 365 uses SkyDrive within your MySite. This of course means your files are stored on the Office 365 servers. The big benefit of using SkyDrive in Office 365 is that you can share your files with anyone who has a live.com email address. This is actually one of the key benefits for using Office 365 because you can share files and documents with your customers and business partners with very little effort.

A common problem that is faced for many organisations, whether you are using SharePoint 2013 on premise or on Office 365, is that you may need to take your files with you on the road. If you need to work on your files offline then you should consider using SkyDrive Pro to cache a copy of the files on your laptop or tablet. SkyDrive Pro will be shipping as part of Office 2013 Professional Plus and replaces SharePoint Workspace which was part of Office 2010 Professional Plus.

By using SkyDrive Pro you can connect to libraries in SharePoint and cache the files on your computer. If you change any of these files while you are offline then the changes will be automatically uploaded back to SharePoint when you are next online. This provides you with the flexibility to work on files on your laptop and you won't have to remember to upload these to your SharePoint site because SkyDrive Pro will ensure your files are automatically uploaded. If you work on multiple

computers then this becomes a very convenient way of working with office documents if you have SkyDrive Pro keeping your files synchronised between your SharePoint site and your multiple PCs. For anyone who has been using DropBox or other similar services you may already be familiar with the convenience of having your files available on all of your PCs. SkyDrive Pro has a very similar interface; however, your files will now be centrally stored on your corporate SharePoint Servers.

Hybrid solutions

With IT Departments coming to terms with services on premise and services based in the cloud a new term that has arisen in cloud savvy circles is the concept of a "Hybrid Solution", which simply means we can take the benefits of on premise and cloud solutions and merge them together. For example, you may choose to use SharePoint 2013 on-premise for your intranet; however your extranet can take advantage of Office 365's ability to share content with any user that has a Microsoft live account to easily collaborate with your customers and business partners.

Another example of a hybrid solution is the "SkyDrive Connector for SharePoint", which enables you to integrate your public SkyDrive on live.com with your on premise SharePoint SkyDrive. This is an ideal solution to allow customers or partners to upload files to your live.com SkyDrive with these files appearing as though they are inside your on-premise SharePoint site. This gives you from 7GB of data to share with people outside your organisation without the technical hassle, and most importantly the solution is free. If you are interested in this solution you can download it from CodePlex <http://skydriveconnector.codeplex.com/>.



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Patent sale helps kickstart 2013

Kodak has kicked off the year in 2013 with the news it has successfully completed its \$US\$27 million patent sale to help with its long term recovery.

The sale and licensing of digital imaging patents for \$US\$27 million, which achieves one of Kodak's key restructuring objectives, follows recent Court approval for the company's interim and exit financing. Kodak says the return on its IP assets further builds on its momentum towards emergence in mid-2013.

"The licensing and sale of our digital imaging patents is another major milestone toward successful emergence," Antonio M. Perez, Chairman and Chief Executive Officer, said.

"We are on track to emerge as a profitable, sustainable company."

In addition to retaining rights to use the 1,100 digital imaging patents sold in the transaction, Kodak maintains ownership of about 9,600 patents, including many focused on its core business.

The transaction includes an agreement to settle current patent-related litigation with Apple, Fujifilm, HTC, RIM, Samsung and Kodak.

Positive news continues on to its Document Imaging division. Dolores Kruchten, President of Document Imaging Worldwide, said "Document Imaging had a good finish in December and delivered another year of strong financial performance.

"This is a testament to our customers, suppliers, partners, and employees—all of whom worked together for success." Their continued focus on quality and performance has resulted in a number of recognition received last year for its products:

1. "2012 BLI Scanner Line of the Year"
2. "2012 BLI Winter Pick"
3. "2012 BLI Summer Pick"
4. "Editors' Choice" from PCMag
5. "Better Buys for Business"
6. "DM Award" from Document Manager Magazine

"This year, we continue to invest in the things that have made our business consistently successful; new and innovative products and software development, enhanced services offerings, employee training, and marketing programs to name a few," said Francis Yanga, Business Manager and Channel Manager – Australia and New Zealand.

"This will be seen in some of the new compact business scanners and new software solutions we are announcing starting this month" Yanga added.

Kodak unveils versatile range of compact scanners

Kodak has announced the launch of its i2900 and i3000 Scanners as well as new capture and workflow software and solutions, Info Activate and Info Insight.

The Kodak i2900 Scanner is a compact unit designed to help the introduction of document management for a variety of business functions including finance, operations, legal, sales and human resources. With a small footprint size of 43.2 x 37.1cm, the i2900 combines a rotary scanner with a higher than average capacity feeder and a built-in book-edge flatbed scanner. This eliminates the need for two scanners on a desktop, offering a more compact setup for capturing images from book pages, magazines, folders and passports as well as applications, forms, invoices and other flat documents.

"The i2900 Scanner performs as a single desktop solution with customised setups, shortcuts and other automated features to handle up to A4 size documents," said Budd Webster, Business Director for Scanners and Document Imaging Category Management. "This powerful scanner delivers a rich, user-oriented experience that helps businesses redefine productivity."

Its graphic user panel displays messages that relate to job name or job status. Businesses may customise these messages to request additional action related to scanned documents. Software integrators and providers can also use the feature to simplify how their application works with the i2900 by displaying job shortcuts assigned to preconfigured settings such as colour, file type and file destination.

The i2900 also comes equipped with Kodak's Perfect Page technology, which delivers automatic image adjustments to further increase user productivity. Perfect Page finely tunes imaging and scanning characteristics to ensure optimal clarity and accuracy.

The i2900 Scanner includes Kodak's Intelligent Document Protection feature, which extends the paper jam protection provided from Kodak's Ultrasonic Multi-Feed detection. The new capability helps protect documents from physical damage by automatically pausing the paper transport and allowing the user to take appropriate action if the scanner detects the start of damage to a document.

The i2900 Scanner can also attach to a post-scan rear-side imprinter. Dual LED illumination enables quick scanning starts and helps to ensure image clarity and colour stability. The i2900 is compatible with TWAIN, ISIS and Linux-based scanning applications.

The newly-released i2900 includes a built-in book-edge flatbed scanner as well as a 250-sheet feeder/elevator with handling speeds of up to 60 pages per minute (ppm) at either 200 or 300 dots per inch (dpi) image quality in both colour and black and white. A selectable rear-exit paper path can handle larger or thicker documents that pose a challenge for traditional rotary scanners.



i3000 Series

Occupying the same compact footprint as the i2900, the i3000 Series of scanners includes two models (the i3200 and i3400) each compatible with TWAIN, ISIS and Linux-based applications for easy setup and integration into existing scanning programs.

These increase throughput to up to 80 pages per minute (ppm) for colour, black and white, simplex or duplex scans processed at 200 or 300 dots per inch (dpi)

Also, equipped with a 250-sheet feeder/elevator, the i3200 and i3400 each handle documents from a reliable paper transport that optimally positions documents for maximum image clarity as they are captured by the scanners' imaging cameras. Dual LED illumination also aids in providing image clarity and color stability as well as quick scanning starts.

Users also benefit from the versatility of two paper path options. The i3000 Series offer a traditional front exit or an optional rear exit on the back of the scanner. This functional choice gives users the flexibility to select the best method of paper transport according to a document's length and thickness. The i3200 Scanner and the i3400 Scanner also support both the KODAK Legal Size Flatbed Accessory and the KODAK A3 Size Flatbed Accessory to handle additional media options. The i3000 Series Scanners can also attach to a post-scan rear-side imprinter.

The i3000 Series Scanners include Kodak's Intelligent Document Protection feature, which extends the paper jam protection provided from Kodak's Ultrasonic Multi-Feed detection. The new capability helps protect documents from physical damage by automatically pausing the paper transport and allowing the user to take appropriate action if the scanner detects the start of damage to a document.

"The i2900 and i300 series are exciting products for the Australian and New Zealand markets as they fit squarely into many vertical applications such as invoice automation, claims processing or even just general office scanning, as well as industry segments such as health, insurance finance, and government," said Yanga.

"The many software and hardware products we are releasing this year re-affirms Document Imaging's commitment and continued investment to innovation".

Info Activate keeps SharePoint in order

Kodak has announced the latest release of its Info Activate software, version 1.1, designed to help structuring and simplifying document entry and indexing within SharePoint.

Built using SharePoint 2010 as a development platform, Kodak Info Activate Solution v1.1 provides new capabilities to help SharePoint administrators control business process workflows and improve how knowledge workers capture and organise documents from multiple sources into SharePoint libraries.

Edward O'Meara, Kodak's Business Development Manager for Solutions, Document Imaging, said, "While workforce adoption of Microsoft SharePoint is on the rise, challenges remain in areas of information governance and ease-of-use for end-users. SharePoint implementations can

present challenges caused by a lack of governance tools to manage inconsistent workflows and unstructured information. Info Activate Solution helps SharePoint administrators gain greater control over the growing amount of content in SharePoint and prevent errors caused by knowledge workers who incorrectly enter or index information into document libraries."

Info Activate Solution v1.1 includes an optional workflow module that enables more efficient implementation of business workflows. Administrators use a visual designer with drag-and-drop graphic icons to easily replicate workflows such as sequences of reviews, approvals, status updates and routing.. SharePoint administrators can also use Info Activate Solution v1.1 to control the field of visible jobs in the user interface to ensure knowledge workers scan to the correct SharePoint library.

SharePoint library permissions define which workflows are accessible to end-users. These settings help minimise confusion and variability that can lead to errors.

KODAK Info Activate Solution v1.1 also introduces electronic file import capabilities that allow users to enter electronic documents into the same workflows as hard-copy documents. These include native digital files and electronic documents captured from other office equipment such as fax or multifunction peripherals. An OCR-assisted indexing system helps users save time and deliver more accurate results versus manually keying in data.

www.kodak.com/go/InfoActivate.

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RecordPoint Software

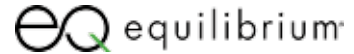
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RecordPoint was created to cost effectively fill the gaps in SharePoint that prevent it being used as a standards compliant, enterprise grade record keeping solution. RecordPoint addresses the local compliance challenge by leveraging and extending the native document and records management capabilities in Microsoft SharePoint to provide a 100% SharePoint solution that is built to meet global and local record keeping standards that were previously cost prohibitive or technically unfeasible. By adding capability to the Microsoft SharePoint platform, RecordPoint: reduces the cost and complexity of electronic and physical record keeping; increases the adoption of record keeping processes by end users; results in ISO 15489 and ISO16175 compliant document and records management, increases information worker productivity and reduces business risk; enables IT platform consolidation, saving cost and simplifying operations; and improves SharePoint scalability, manageability and performance.

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MediaRich ECM for SharePoint is a cost-effective solution for SharePoint that generates thumbnail previews of the original file or video format; adds zoom and pan functionality; enhances all searches; provides automated editing and conversion and delivery for one or multiple media assets on demand. In essence, it adds a self-service Digital Asset Management (DAM) system within SharePoint.

Features include:

- Visualisation of all files in any SharePoint library – visual thumbnails and preview window
- Over 400 file formats supported – Office, Images, Audio and Video
- Play video and audio files with one click within any SharePoint library
- Supports smart phones and tablets for direct access

Value Proposition: Improved User Adoption and Utilisation of SharePoint; Digital Asset Management (DAM) or Media Asset Management (MAM) within SharePoint; Centralise Brand Management and your Digital Assets in SharePoint. Reduce rework and inefficiencies with these expensive corporate assets.

Kofax

Phone: (02) 8916 0200
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Email: mailbox.au@kofax.com



Kofax enterprise capture solutions extend SharePoint to handle any capture need, making business critical information available across the enterprise quickly and easily.

As the global market leader in enterprise capture, Kofax allows any user, from any location, to quickly and easily capture documents and deliver them to SharePoint, creating capture driven business processes.

Kofax manages the capture, transformation (classify, separate, extract) and exchange of business critical information arising in paper, fax and electronic formats in an accurate, timely and cost effective manner from production and desktop scanners, multi-function peripherals (MFPs), email, and even SMS/MMS.

Kofax automatically classifies captured information by type, extracts information from the content, converts it into structured electronic information, validates the data, and delivers it to SharePoint where business rules and workflows can be automatically triggered.

Higher accuracy and better information and data improve the accuracy of your downstream business processes. This leads to reduced costs and processing time through touchless processing, fewer errors, improved compliance, and reduced risk.

OpenText

Contact: Owen Brandt, Strategic Alliance Director & Microsoft Lead
Phone: (02) 9026 3470

Email: Owen.brandt@opentext.com

OpenText and Microsoft collaborate to provide real business solutions for corporate customers that combine the power of the Microsoft Application Platform and Productivity technologies with OpenText's deep understanding of Enterprise Information Management (EIM).

When running OpenText products with Microsoft technologies, organizations are able to connect all aspects of their information infrastructure and take advantage of their most valuable asset – content. Together OpenText and Microsoft also allow organizations to better scale database operations with confidence and improve IT and developer efficiency – all at a lower total cost of ownership over competitive solutions.

Through its strategic alliance, OpenText and Microsoft are delivering solutions and frameworks that embrace and extend the Microsoft platform including Office, SharePoint, Exchange and SQL Server with industry specific applications.

For more information on OpenText products for the Microsoft ecosystem, please go to <http://www.opentext.com/2/global/products/products-opentext-ecm-suite-for-microsoft.htm> or visit www.microsoft.com/opentext.



Kodak

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Web: www.kodak.com/go/docimaging

Kodak offers an array of flexible solutions to create, share, manage, edit, and collaborate on information within Microsoft SharePoint. And do it all faster, with more features and less hassle. Kodak provides a more streamlined, fully-featured way to scan and manage information within SharePoint – no matter what input source, scanned or electronic. For Data Input to SharePoint, many Kodak scanners offer our one-touch solution for ad-hoc scanning. Simply configure a shortcut to the correct SharePoint destination; scan a document once; then output directly to SharePoint. For production scanning environments, Kodak Capture Pro Software is an excellent choice that scales from a single station to a network edition for use across your enterprise. For Collaboration, Kodak Document Viewer Software accelerates how you find, view, and share documents in SharePoint and supports over 300 file types all viewed within SharePoint. Kodak Scan and View Software provides, annotating and collaboration to your SharePoint. A simple scanning application is built right into the SharePoint document library. Edit, annotate, split and merge, search, compare, and perform other key functions with documents, quickly and seamlessly.



OnePlaceMail

Phone: (02) 9977 1312

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Web: www.scinaptic.com

Twitter: @OnePlaceMail

OnePlaceMail streamlines the capture and classification of content from desktop applications such as Microsoft Outlook, File Explorer, Word, Excel and PowerPoint into SharePoint and Office 365. Corporate information assets, once trapped in personal inboxes are now better utilised and managed according to information and records management policies defined within SharePoint. OnePlaceMail drives the adoption of solutions built on the SharePoint platform by providing the user with:

1. The full power of SharePoint within Microsoft Outlook, including the rich SharePoint search capabilities.
2. A natural extension to existing desktop applications and therefore minimal change in behaviour

Getting started - OnePlaceMail is available in two editions:

Express Edition - 100% free edition - download now; Enterprise Edition - 30 day trial – start trial from our website.



EzeScan

Phone: 1300 393 722

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Email: sales@ezescan.com.au

Web: www.ezescan.com.au



EzeScan is Australia's most popular production document scanning software solution and product of choice for many Records and Information Managers. This award winning technology has been developed by Outback Imaging, an Australian Research and Development company operating since 2002. With more than 750 installations world-wide, EzeScan enables its clients to substantially reduce the cost of deploying batch scanning and data capture solutions for documents of all types. With "out of the box" seamless integration with many industry standard EDRMS and/or ECM systems including SharePoint, EzeScan saves both time, money and lowers the risks associated with developing and integrating third party scripting or custom programming. EzeScan solutions range from basic batch scanning with manual data entry to highly automated data capture, forms and invoice processing. EzeScan benefits include;

- initiate intelligent automated processes
- accelerate document delivery
- minimise manual document handling
- capture critical information on-the-fly
- ensure regulatory and digitisation standards compliance

ABBYY

Phone: (02) 9004 7401

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ABBYY Recognition Server is a high performance OCR conversion solution, providing seamless integration with Microsoft SharePoint and Exchange Server. The integration allows direct document import and export of converted documents, including specified metadata, in any configuration into the aforementioned systems. ABBYY Recognition Server runs as a centrally managed OCR service with optional concurrent operator workstations for scanning, verification and indexing (metadata capturing).

The indexing includes a fully automated barcode capture, document separation and file naming capabilities, as well as zonal and runner-band OCR indexing. With full support of all popular input and output file types, the widest range of languages and the ability to utilise many different workflows (that can be prioritised) this product is able to cater to all OCR needs of a vast majority of organisations. Designed for large volumes of processing, ABBYY Recognition Server easily scales by addition of CPU cores and can utilise the processing power of any available computers on the network. ABBYY Recognition Server I filter connector "unlocks" the content of scanned and unsearchable documents and makes them accessible for indexing by MS SharePoint Server Search and MS Windows Search.

Iron Mountain

Phone: 1800 476 668

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Iron Mountain is a global provider of electronic and physical information management services for complete information lifecycle management. To make it easy and reduce costs, we provide an affordable, hosted document management platform that will suit a business' tactical needs, provide scalable low cost of entry that will grow to become your full enterprise document management platform. Our hosted, subscription-based EDRMS can be configured to suit your needs, growth strategies or specific requirements, to provide: Full EDRMS and search functionality in a PCI compliant environment; Access through integrated Office desktop, browser or mobile apps; Hybrid, VERS compliant, records management for digital and physical documents; Email management and scanned image processing; Document-centric workflow for approval, review or routing; Manage HR Files, Legal Files, Accounts Payable, Contracts Management, etc.

If you need to always keep it in safe hands, keep it easy; think outside the box – Iron Mountain

OAIC COMPLETES A SWIFT TRANSITION TO DIGITAL ERA

The Office of the Australian Information Commissioner (OAIC) has completed a migration to digital recordkeeping, successfully implementing a TRIM EDRMS in 2012.

A relatively new agency established in 2010, the OAIC is responsible for oversight of the FOI Act 1982 and is also the privacy regulator. The OAIC also has a role to play to protect information rights and advance information policy with commonwealth government. It has 90 staff across two offices located in Sydney in Canberra

When established in November 2010 the organisation initially had an agreement with the Australian Human Rights Commission to provide document management through a SharePoint deployment and paper file management through a traditional paper based records management database.

Project Manager Veronica Pampa came on board in 2011 to assist the OAIC's Information Platforms section with implementing a complete information and records management architecture. Veronica had a 20 year career in records management with the federal public service, most recently at the Department of Human Services.

"We needed a more comprehensive solution for electronic document and records management," said Ms Pampa.

Paper jam

The OAIC was initially printing and filing email and other documents using a database to keep track of paper files. The OAIC also had documents stored in the SharePoint system with limitations on sharing documents across locations and difficulty finding information.

"We needed a more robust structure to find stuff again after it was filed, staff were just putting documents in by day and date and month and couldn't find information again."

Ms Pampa put forward a case for TRIM using an existing commonwealth government contract 'piggyback arrangement' with the Australian Competition and Consumer Commission, ACCC. There was limited budget and time constraints to get the system implemented. Under this contract the OAIC was able to take advantage of the portal over TRIM solution through iCognition Pty Ltd.

iCognition were able to provide an analysis of the OAIC requirements and map out a transition to a full single repository. To encourage the move to a totally electronic document management environment the OAIC has now turned off its shared drives and requires all incoming paper to be scanned using existing MFDs.

All email and documents are stored in TRIM with social media soon to come.

"Given the nature of the organisation it needs to be a clear leader in best practise record-keeping," said Ms



"We needed a more comprehensive solution for electronic document and records management," - Veronica Pampa.

Pampa. "The National Archives has flagged that it will no longer accept paper records for items that need long term storage after 2015.

"This will put pressure on agencies that have not moved to electronic record-keeping by that date, as they may end up left with a big scanning job before they can hand-over."

"Since the National Archives announced its digital transition policy agencies have had to take a more serious look at their services and what it's costing them for storage and finding the business advantages of going fully electronic."

"It was quite rewarding to be involved in a project that was not another hybrid solution but fully digital."

During the project the National Archives approved the new records authority for the OAIC to complement the implementation of the EDRMS. This authority allowed staff to apply structured metadata to files and documents as they created them in TRIM.

The authority also provided a life cycle based on functional value to the OAIC to allow staff to make decisions on how valuable the information and how long to retain the information.

OAIC uses Resolve the case management system to manage FOI and Privacy complaints and enquiries. The Information Management strategy developed by Ms Pampa provided future direction to link the case management system to the TRIM system.

OAIC Enterprise Systems

Microsoft Enterprise Licence
Resolve Case Management
HP TRIM 7.2
iCognition DM portal

A major project to scan over 420,000 pre-1970 birth records at the Tasmanian Registry of Births, Deaths & Marriages (BDM) will help with the challenges associated with transitioning to e-government as well as assist national initiatives to prevent identity fraud. Iron Mountain in Hobart scanned over 420,000 records during a 16 week period, using a freshly acquired Bookeye3 R1 scanner.

The records, contained in 215 birth register books and spanning the period 1920 to 1970, were scanned in colour at 300DPI in output multipage TIFF format with JPEG Compression

Ann Owen, Manager Registration & Licensing Services with Tasmania's office of Consumer Affairs and Fair Trading, managed the project, which was undertaken as a result of the previous method of accessing these records being very labour intensive.

"Most of the records are held in register books, but some are loose-leaf sheets. Previously BDM staff had to access the relevant register and transcribe the information into the BDM database (Vitalware) before a certificate could be produced. This process is costly and negatively impacts turnaround times as well as requiring a concentration of resources that detracts from other areas of BDM operations," said Ms Owen

The 420,000 birth records are just one component of more than one million historical typed and handwritten paper records for the period up to 1970. These comprise approximately 250,000 marriage records, 266,000 death records, 476,000 birth records, 10,000 adoption records and 5,550 Deed Poll records. The majority of applications received by BDM are for birth certificates from 1920 onwards and as post 1970 birth records are already held in an electronic format, the 1920-1970 birth records were considered the top priority for digitisation. There were also concerns that the declining state of repair of the paper based records could result in the permanent loss of these historical assets.

"The Birth Registers for 1920-1970 are contained in bound books which are all larger than A3 size. While the format of the pages in the books does vary, the books are generally similar with page sizes ranging from 47cm x 33.6cm through to 55.4cm x 37.8cm and are in varying condition. The edges of some pages

Tasmania hatches e-govt initiative

are quite shredded, others have been folded and creased, while others have been torn and repaired with tape," said Ms Owen.

"As part of the process of engaging a contractor to undertake the scanning work, specific requirements were established for the storage and transportation of the registers due to the fragile state of the documents and the confidential nature of the information they contain."

Iron Mountain undertook the work at its Austins Ferry site, which is a short drive from the Hobart BDM office. To assist with the data entry task which is being undertaken by BDM staff, a file naming convention was very carefully designed to enable batches of images to be loaded into the BDM database.

Images were provided in batches where the naming convention for each batch was a hyphen separated list of values as follows:

- (i) event type (e.g. B = birth);
- (ii) area (Hobart/ Launceston / Country);
- (iii) date of first entry in batch in yyyy-mm-dd format;
- (iv) registration number of first entry in batch (5 digits, zero padded);
- (v) date of last entry in batch in yyyy-mm-dd format;
- (iv) registration number of last entry in batch (5 digits, zero padded);

For example: B-Hobart-1922-04-01-00001-1922-11-30-01800

Each image within a batch had to include an incrementing integer (4 digits, zero padded) to identify its position within that batch. Further, a batch of images could comprise not more than one complete Register.

While the scanning task is now complete, work will continue within BDM to enter the data and associated images to Vitalware for approximately the next 12 months.

"This project is part of a broader move to digitise all BDM information, which has seen all new registrations increasingly managed electronically. To this end, all hard copy documents are scanned upon receipt and there is also capacity for approved service providers (so far limited to public hospitals and funeral directors) to register events with us directly through an online portal. All of these steps help to provide a higher level of service to clients as well as reduce administrative burden within BDM" said Ms Owen.

1 PLATFORM TO RULE THEM ALL

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Office 365: Cloud or no Cloud?



Many companies are questioning whether to host SharePoint on premise or in the cloud. There are many factors in determining an answer to this, and indeed hosting in the cloud isn't even a straightforward decision. You have to decide whose cloud you move to for starters.

Each company will have to run it's own investigation, however one thing is certain: The cloud is here and it is here to stay. Companies are either using the cloud, partly using the cloud (a hybrid solution) or are planning on moving there. This head to head focuses on the Microsoft Office 365 cloud (which Telstra manages access to in Australia), versus installing SharePoint locally

So here goes..

1. Server management

O365: What servers? Microsoft does all this for you. No installing anti-virus, patching, backups, scheduling upgrades, upgrading RAM etc.

On Prem: You manage the server. This gives you full control over what you are installing, how you configure the server, what anti-virus you install etc. However I'm sure you have better things to do!

Winner: O365

2. Third Party web parts

O365: There are not many third party web parts available for Office 365, but expect this to change when SharePoint 2013 online is released. There will be a marketplace that developers can sell their web parts (or apps as they will be called then).

On Prem: There are an abundance of web parts and solutions available to purchase, or indeed for free. It's a bit like comparing the Apple app store to the Windows phone app store for number of apps, On Prem wins easily.

Winner: On Prem

By Marcus Dervin

3. Performing Upgrades

O365: Microsoft, creating new functionality and fixing bugs, releases Upgrades every 90 days. These days, at the rate technology is changing, 3 years is a long time between releases, 90 days seems so much more palatable. Also, you don't have to do anything to upgrade, Microsoft does it for you. (Do keep an eye on how it may affect your custom built apps and branding however!). Also if you purchase a subscription now, you are automatically upgraded to SharePoint 2013 for free.

On Prem: SharePoint upgrades happen every 3 years. Patches are released but don't tend to provide a lot of new functionality. Also, if you install a patch and something goes wrong, you are in trouble. Companies tend to only perform the major upgrades. This means you are years behind the latest and greatest.

Winner: O365

4. Mobile Friendly

O365: The advantage of Office 365 SharePoint Online is that of the 90-day release cycle, which will surely cater to mobile devices as a priority. This means you will be able to use your smartphone to perform a whole range of functions as soon as they are released.

On Prem: SharePoint 2013 promises to be more mobile friendly, whereas SharePoint 2010 or certainly 2007 are not compatible with mobile devices, which is essential for today's world.

So unless you are planning to go to 2013 soon, you are not going to access SharePoint via mobiles. And even then, this mobile area is changing so quickly, by 2015 you will be behind again, waiting for SharePoint 2016 so you can try to catch up.

Winner: O365

5. Accessible from anywhere

O365: Login from anywhere, anytime, from any device.

Access your email from your phone, tablet – easily. No questions asked! It's all very simple, and surprisingly secure.

On Prem: To login to SharePoint from outside your company, you possibly need to create a vpn connection. How often are you likely to do that? It would be slow and tedious. It's a whole lot easier to login to O365 via your browser.

Winner: O365

6. Cost

O365: Pay per number of accounts as a monthly fee. You only pay for what you use. Add and remove accounts as you please. The monthly costs vary depending on which package you purchase, but the costs are very reasonable and predictable.

On Prem: Paying for SharePoint Enterprise or SharePoint Standard is not cheap, and you have to also purchase all the hardware and licensing that comes with that e.g. SQL Server Licenses..

Winner: O365

7. Speed

O365: For Australian companies, the Office 365 datacentre is held in Singapore. Therefore speed of connecting to SharePoint online is not super fast. However it is pretty reasonable.

On Prem: If your local network is fast, then your internal access to SharePoint should be quick, and normally faster than your connection to the internet.

Winner: On Prem

8. Scalability

O365: To increase your user base, just add more accounts. To decrease it, reduce the number of accounts. Also you can decide which kind of accounts users should have, all the way from including Office Professional plus to kiosk accounts that only need to read certain information online. There is zero wastage if you manage your accounts well. No need to add more servers, just accounts.

On Prem: In addition to the number of accounts, you need to increase or decrease your farm servers. You will need more or less web servers and database servers. With that comes licensing changes. It's more complex and more costly.

Winner: O365

9. Farm and Central Administration

O365: Handled by Microsoft, so you have less control. However you also don't have to pay for people to look after it for you. And in 99% of cases you don't really need to change anything on Central Administration as you don't have servers to worry about in the first place.

On Prem: Central Admin and the farm or single server are handled locally so you have more control. However you then need to manage it and so need resources. There are not typically many cases where small-mid organisations must manage their own farm.

Winner: O365

10. Collaborating with external parties

O365: Many clients ask about inviting external partners or clients into a project site or document library. With O365 this is super easy, just create an account with appropriate permissions and you can collaborate with partners and clients from anywhere in the world. You can create this as a generic account and reuse it for other projects also.

On Prem: Behind the company firewall, assuming the intranet is not exposed to the world, it is not possible to have external parties collaborating with you. Even if you could, creating Active Directory accounts is sometimes not an easy process internally.

Winner: O365

And the winner is...

Office 365: 8

SharePoint On Premise: 2

And that is not taking into account all the other benefits of moving to Office 365:

- Office Online Apps
- Email
- Lync

Of course we could have looked at a range of other factors in this challenge, but the main ones that people think about were listed here.

So, if you are not thinking about migrating to Office 365, it's time to do so!

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Can barcodes end email confusion?

A previous edition of Image & Data Manager magazine (page 22 Nov/Dec 2012 issue) asked "Can technology classify records better than a human". Records Management Officer Neil McGrath has developed an approach that integrates barcode labelling of emails within an EDRMS to assist in tracking email conversations and reducing duplication while providing improved aggregation and linking. Neil McGrath is Records Management Officer at Canegrowers, the peak body that represents around 80% of Australia's 4000 sugarcane growers, with 14 offices throughout Queensland.

In days past with hard copy correspondence it was routine to include a reference number in your letter so when a reply was returned hopefully this reference number would be quoted to allow for simple matching and filing of corresponding items.

Today with the fast pace of email that luxury no longer exists. When a reply to email correspondence is received you not only get the returned reply but also your original item as well.

Depending upon the format of the email it may have one or many attachments, however clicking the reply button strips off the attachment and a conversation can continue

for quite some time.

Prior to electronic mail, correspondence was sent inside an envelope which had very little practical information and was discarded. Now email is the envelope as well as sometimes the actual correspondence itself. It can also carry associated information as attachments and include other email which may have several attachments or even worse multiple nested levels.

Records Managers have no say over how the email they are asked to capture has been formed. They require many tools to work with it whilst retaining it in its native format.

Traditional thinking has been to electronically capture or (heaven forbid) print out each inward & outward motion, ebb & flow of an email exchange. I believe it more prudent to maintain a system of significant capture points, such as when attachments are sent out, attachments returned, when new players become involved and forked dealings.

For this concept to work effectively it must be applied at either the initialisation point, or what I term 'First Point of Contact' for the organisation. This way incoming email received by multiple recipients would all carry the same reference/barcode number.

At Canegrowers this is being accomplished by having the records manager (myself) keep track of emails & apply the same barcode number to the newest part of any particular conversation, discarding previous duplicated parts prior to capture into the EDRMS. This approach works fine within a small organisation with only one records manager. Once the method has been accepted it will be open to users to apply the barcodes.

There are still some Implementation hurdles to overcome:

- Firstly, the need to allow barcodes to survive across organisational boundaries and passing through many points where attachments are stripped
- Removing font dependence
- Persisting within different email formats and able to be reconstituted

Presently the barcode is appended to an email on the fly via an Outlook macro. However since Outlook 2007, macros now trigger security notifications so there is in train the initial stage of designing a specific Outlook Add-In to overcome this constraint.

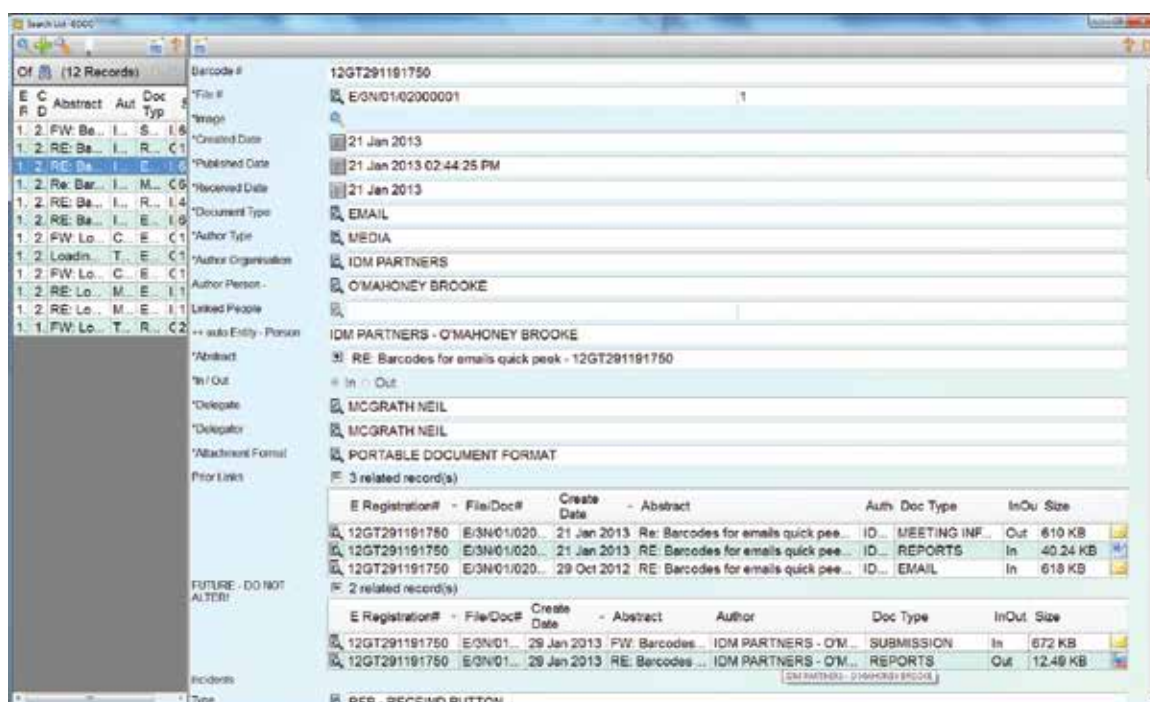
The macro code calls a small free barcode library which then returns a correctly formatted graphical barcode into the current email as well as embedding a small piece of text inside the email. This text will persist should either the sender, recipient or any intermediary process remove the barcode, allowing the graphical barcode to be reconstituted.

This same reference number is also appended to the subject line of the email which in my case further automates later capture processes. The barcode is placed into the top RH corner of the email and as the exchange continues, keeps floating to the head of the email.

The benefit of this is that should an email be printed and subsequently notated, any document scanning will automatically apply this number to the captured electronic file allowing easy match up with data already captured using this same reference number.



Barcode applied to an email



This view of an electronic document held in our RecFind EDRMS shows links to the significant capture points. When viewed from a particular point in time you can see what has been linked both in the past and the future.

The same barcode/reference number is appended to most of the correspondence (attachments) contained within that particular email, through a number of different processes dependent upon the type of attachment. Some record-keeping purists may argue that altering the content of an email message is sacrilege, however I contend this is no different to the manual filing processes of applying either a File / Date / Retention stamp or barcode label to a hardcopy item or removing a report already filed.

Barcode is King

The barcode number dictates the ID of the electronic document or hardcopy item and whilst the barcodes are sequential, the order of entering them into the EDRMS then does not require any particular pattern.

At Canegrowers we use the RecFind EDRMS for electronic as well as for hardcopy recordkeeping.

When an email is stored in RecFind using the RecFind Button AddOn it automatically fills in a whole host of meta-data including placing the subject line with this barcode

number straight into the abstract. This then allows direct copy and paste reducing keystrokes and possible errors as this same barcode/reference number then becomes the reference number (ID) of the electronic document.

Within the EDRMS this ID is not required to be unique which allows for the same conversation item to utilise this same reference number at the various capture points.

For our hardcopy correspondence we apply a barcode sticker prior to scanning & capture, although this process uses a different numbering format more akin to standard RM practices. Different barcodes can be applied to any forked conversations to other players who may have been involved but subsequently relinquished the jousting back to the main combatants. Again these can easily be linked as they already contain the previous reference number within the subject line in their earlier transactions

Some may ask why barcodes provide a better way to manage and store email as records, instead of just storing everything and searching by metadata.

(Continued over)



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I have settled on the 3 of 9 barcode format for my barcodes as this matches up with the hard-copy barcode scanning process delivered as part of our RecFind set up, this allows a corresponding human readable number to be seen alongside the actual graphical barcode, not available in QR codes and some other formats.

I have created my barcode numbers along the following format maintaining a consistent 15 character length.

- First 2 digits represent the year
- Next 2 sender initials
- Next 3 day of the year
- Final 6 timestamp in HHMMSS - 24 hour format.

Such a numbering format scheme with the assistance of wildcard characters quickly allows for all items for a particular Year, Person or timeframe to be found and or linked

Although this design does not make the barcode absolutely unique in that it is possible that multiple people with the same two initials could send an email at exactly the same second.

The possibility of having identical reference numbers is more likely in larger organisations, for me this is negligible and likely that the subject lines would differ sufficiently to be easily discernible.

The coding in such circumstances may require changes, perhaps an employee number or other code would be captured

Barcode format



and inserted. This would require a whole of organisation approach or the timestamp could be extended down to microseconds although again still not guaranteeing absolute uniqueness

The 3 of 9 format specifies each character requires 5 bars as well as stop & start characters. Extending the length of the code may necessitate one of the other barcode formats to be used, as the physical barcode length will certainly become an issue

for anything longer than I have advised above.

This system is also used to track an individual case by quickly appending the same reference number to all pieces of correspondence. A quick metadata search will provide the case reference number which is then copied and pasted into the barcode generation macro providing minimal chance of error due to the fact the reference number is never typed, it is always copied & pasted.

I am using this process for both our crop & general insurance dealings in which the same reference is applied to all correspondence for that particular year.

We also utilise some code that lists the contents of ZIP files which similar to the attachment listing described elsewhere is also captured into the abstract. We are working on creating a list of timestamps within an email conversation which would quickly allow comparison of which parts of a conversation are already included.

Can barcodes end email confusion?

(From previous page)

When applied correctly from the conversation start, the barcode number is automatically applied and will remain intact with that particular item until destruction, it is not subject to interpretation and with attachments of a particular item bearing the exact same number any search will find all instances of any particular reference number. This allows for managing the entire conversation as one. Whereas metadata will fluctuate dependant on capture point especially when multiple participants are involved and the subject line is changed which occurs frequently. It will also point to where a particular fork may have strayed from the main conversation as normally the subject may change at this point.

The barcode also indicates that an item has been marked for capture and the status can be quickly checked

Barcodes also help reduce duplication of attachments with the same data being constantly saved over & over again as occurs with traditional methods.

Another macro creates a listing of all attachments inside a particular email message which is captured into the abstract. This then allows the user to quickly search the EDRMS for an item of the same name and then compare the properties of any similar named items.

We provide a link to prior items already received under a specific barcode number and using the barcode num-

ber the search for prior items can be achieved extremely quickly. Should an item already be captured we then create a pointer (link) to that item. This allows discarding some if not all of the attachments. Of course this requires a good knowledge of what has already been captured using the attachment listing information with saved properties. Each email and associated attachment(s) carry the same unique barcode. These individual barcode numbers are then able to be linked within RecFind to provide an end to end view. Past & Future links – see screen dump Notation of all alterations are stated in the abstract with linked reference numbers copied and pasted again reducing keystroke and data entry errors.

Sample Attachment listing

Listed Attachments:-

2012 HAULAGE LOADING GUIDELINES COVER V6.PDF - (643968) - (28/10/2012 11:43:30 PM)

2012 HAULAGE LOADING GUIDELINES.DOCX - (3028686) - (11/02/2013 5:27:06 AM)
IMAGE001.PNG - (11493) - (11/02/2013 5:28:25 AM)

These processes rely on full access to Outlook and cannot be initiated on mobile devices without the full version of Outlook. With the emergence of tablets now running the full Windows Operating System this should now become less of an impediment. (The barcode will persist on mobile devices, it just cannot be started from there.)

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Building a paper-less future

One of Australia's leading residential home developers, Henley Properties Group runs a document-intensive business. For each house built, there's a design that needs to be documented, project plans, lists of materials, build schedules, client contracts, subcontractor arrangements and the list goes on. On top of this, there are the normal operational paperwork needs of a multi-million dollar business working across three states, Victoria, South Australia and Queensland.

For some years Henley management was aware that a document management solution would help to bring more order to its mountain of data. Measures such as making all documents available through a central location and the introduction of document version control would enable staff to locate information faster, providing dividends through greater efficiency and accuracy.

However, deciding on the right approach required careful thought and a committed effort. It wasn't until 2010 and the arrival of Jeremy Bree as Henley's new CIO that the vague intention evolved into a serious project.

One of Bree's first actions was to take a thorough look at Henley's business, to see for himself what each area of the company was doing, what it needed and the outcomes that were required.

"I found we needed something more than a place to simply store documents. People had to be able to get documents from a number of different sources. There was a need for many different people to quickly and easily search and find documents. And people had to be able to assign a document to someone and trace its progress through a workflow."

Based on his analysis Bree prepared a document management requirements document and invited software vendors to respond. Key considerations included comprehensive indexing, version control, workflow functionality and ease of use. After reviewing responses and viewing demonstrations, Bree selected a solution that married workflow advice and expertise from CAYLX, one of Australia's leading business process management organisations, with OnBase, an advanced document management solution developed by Hyland Software.

Keeping suppliers happy

The first part of the business to work with the new solution was accounts payable. Under the existing manual system, every invoice was sent to a manager for approval, before being returned to accounts payable for processing. Typically the process took two-to-three weeks. With around 2000 invoices received every week in Victoria alone, the potential gains from any efficiency measures were significant.

"Our initial scope was to shorten that cycle to keep our

cash flow steady and keep creditors happy," Bree says.

CAYLX worked with Henley staff to develop a new approval process based on invoice scanning to remove the time and effort of manual keying. The scanned document would be automatically routed to the correct supervisor for sign off then returned to accounts payable for payment. Workflows were created to ensure no "paperwork" was lost and to ensure timely action at every stage.

Payment time down to one week

Testing and a phased roll-out of the solution began in 2011. To date, OnBase is being used by Henley in Victoria and Queensland for the majority of operational and a wide range of project-related invoices.

"There are still a few refinements that need to be made because we still encounter new iterations on the process based on the needs of different jobs, but we're in a comfortable place," Bree says.

Already, the new system is delivering reductions in invoice processing time with many suppliers now being paid within a single week. Fast look-up of supplier invoices is leading to improved matching of invoice items to particular jobs. And, although it is difficult to measure, Bree suspects that scanning rather than manual data entry will deliver improvements in accuracy. Scanning has also introduced less opportunity for invoices to be lost, as the amount of paper physically travelling through the offices has been reduced.

Expanding into the business

The success of the accounts payable deployment has led to requests for workflow and document management within other parts of Henley's business. Scanning of contracts will soon be introduced for staff located at property display sites. This will speed customer service by ensuring paperwork is received within head office and routed to the correct person for processing as soon as the sale is concluded.

"If a sale is made on Sunday, by Monday morning when staff come into the office, the paperwork will be there, ready for action," Bree notes.

The IT team and CAYLX are also working on ways to streamline the processes associated with occupational health and safety (OHS). OHS is a big issue for the construction industry and so far, Henley has identified close to 30 different books of forms that are constantly carried around by OHS staff.

These will be created as electronic forms so that supervisors and managers can capture and electronically lodge information such as incident sheets while on site. Bree believes that with new processes and workflows continually being identified, it's going to take at least another 18 months before the initial roll-out of OnBase is completed.

"OnBase is an ever-evolving product in an ever-evolving organisation. If it was really just doc management that we wanted, other products may have been able to fill that



"In the high-demand world of building, this is making a crucial difference." - Henley Properties Group CIO Jeremy Bree.

need but it's the additional gains that you can achieve when you combine workflow with a document that are making the CAYLX project so beneficial."

Data from scanned invoices and those that arrive via email as PDF is extracted via Datacap capture software then loaded into the company's Dynamics AX financials application. Once the process is rolled out nationally it will be applied to thousands of invoices received every week.

"The invoice processing application is opening doors for us to extending paperless process across the rest of the organisation," said Bree.

One of the first targets is the generation of purchase orders (POs). Currently when a PO is generated by Dynamics it is emailed out to a supplier with a number of related documents attached to the email. As some of these related drawing files can be large 20-30MB PDFs it will instead now send a username and password for the vendor to log into OnBase externally and download the files.

It will also help the company step off the paper roundabout. Presently each time a house is completed and handed over to the new owner, all paperwork related to that project is placed into a storage box and handed to an external storage company, which scans selected documents and sends them back to Henley.

"Most of those documents we have created ourselves or received digitally so we need to change our processes so we don't end up with a box of paper.

"To do this, we are now building integration into Outlook and our printers and MFDs to get the documents into our document management system at the source, so at the end of the job we don't need to do anything with that paper because we've got it all in OnBase," said Bree.

The change will require a major shift in workplace culture and document management practices. Creating a single source of truth is high on the agenda.

"Currently a permit or licence might be emailed to four people and they all save it somewhere, so we end up with five copies of that permit document sitting somewhere.

"Which one of those five copies is the latest version? With OnBase we are introducing version control so people will now send a link to the original permit held in the DMS," said Bree.

"It will also provide email notification, so if a drawing is updated and saved into the DMS the right people get notified. The construction manager on-site needs to know if there's been a change made to the plan and not rely on someone to remember to give him a call."

Currently there are around 100 of Henley's 450 staff working on the OnBase DMS and this will eventually extend all across the company. Many are still using network file-shares.

"We have a hybrid approach at the moment until people get used to the new concepts and way of working. There is a small select group of people can save direct to DMS and they are helping us to make process changes."

As people are still getting used to saving into the DMS, Henley has system running in the background that automatically ingests all material from a jobs directory and performs a full index on a daily basis.

So when a supplier logs in to the DMS check a drawing they are sure to get the latest version. It also ensures that Henley project managers who are working in the field running half a dozen home construction projects across different suburb can login remotely and ensure the latest plan is available. Working with a Windows-based tablet and connecting back into the home office via 3G VPN.

"We are not looking to eliminate paper, that's a pipe dream, but we are looking to minimise it. Construction guys like to have an A3 plan you can roll it out, draw on it and get a good feel for it. You can't get that same feel on screen," said Bree."

Titus updates SharePoint security suite

As Microsoft SharePoint becomes an increasingly critical platform for document and records management, administrators and content owners are faced with the challenge of protecting sensitive content and preventing data breaches.

The Titus Security Suite for SharePoint 3.2 has been enhanced with Dynamic Policies. These enforce dynamic, fine-grained security in SharePoint with policies based on trusted user attributes (claims) and metadata.

Dynamic policies can be used to instantly deny access to SharePoint content when a user's status changes, such as employee resignations or terminations, as well as to block individual group members from accessing sensitive content, even if the group itself has access to the content.

Centralised Policy Administration now allows policies to be applied across site collections, sites, libraries, or folders using new administration options.

Also new is support for effective data governance and compliance by auditing Titus administrator and security policy actions. Organisations can track when administrators create, edit, or delete a Titus policy. They can also track when Titus sets or changes content permissions, enables user access through dynamic policies, applies visual markings to documents, and converts documents to PDF.

www.titus.com

Tricerat revamps remote scanning software

triCerat has released the next generation of its Scanect remote scanning software which works by querying local scanners for capabilities such as resolution and supported paper sizes, then forwards the scanned product to be virtualised on the server or virtual desktop.

The newly released Scanect v1.2 software provides greater support for remote scanning environments with enhanced controls and configurability for IT system administrators and an improved user experience.

Highlights include:

- Server administrator control, which restricts certain properties of the scanner such as the ability to raise or lower the DPI options and manage color and scan type in order to control bandwidth usage;
- Scanner profiles, which allows system administrators to create profiles with certain specifications (such as DPI levels and color) to provide users with a greater selection of scanner options; and
- Multiple client-side scanner support, which increases the number of scanners that can be supported.

DocuShare launches into the cloud

Fuji Xerox Asia Pacific has launched a set of mobile and cloud solutions for document and file storage.

The Mobile Integrated Application for iOS supports document handling in mobile environments, when linked with the Fuji Xerox DocuShare document management system.

It allows Docushare users to share and use information stored on DocuShare with external parties via a cloud-based Working Folder.

When Working Folder is linked to DocuWorks document handling software, it enables users to simply view, edit,

add annotations and store edited files. The files on Working Folder can also be viewed via DocuWorks Viewer Light for iPhone/iPad.

The Working Folder allows accessibility through an online web browser, personal computer (PC), MFD or mobile device. With simple drag and drop operation, users can upload, download, edit, move, delete and search for documents. Scans or faxes from an MFD can be automatically routed for immediate action – to digitise/convert, print or store. An Android version is due out in the first half of 2013.

Sharegate SharePoint migration via Excel

Sharegate has released a new version of its SharePoint Migration Tools which supports Import & Export to Excel before migrating.

Users will now also have the possibility to:

- massively edit all list item and document properties using Excel;
- take advantage of Excel's effective and powerful formulas to enrich metadata;
- assign metadata to documents and content coming from a file system;
- divide the migration project by sending out the excel sheets and migrate by phases, only when ready; and
- have someone that knows the content update the sheets without having to install Sharegate.

The release also includes the ability to save PDF properties as SharePoint metadata and supports SharePoint custom field types.

<http://Share-gate.com>

Free scan app for Android

Hamrick Software has released the VueScan Mobile Free App for Android devices, adding to its versions for iPad, iPhone and iPod touch launched in 2011.

VueScan Mobile allows you to seamlessly scan documents and photos straight to your Android device, iPad, iPhone or iPod touch from any HP, Canon or Epson WiFi printer/scanner. It works with Android version 2.3 and later, including small-memory Android phones.

VueScan Mobile uses the Wi-Fi connection on your device to find scanners connected to the same Wi-Fi network. If the scanner has a document feeder, VueScan first checks to see if there is a document in the feeder, otherwise it scans from the flatbed.

In addition to sending via e-mail and saving to the Photos App, VueScan Mobile allows you to save scanned images to your favorite apps that can open PDF or JPEG files such as iBooks, Dropbox, GoodReader and Evernote.

The full version of VueScan Mobile App is available for \$US4.99.

Designing rich SharePoint forms

SharePoint Forms Designer 2 is a new release of this tool which allows users to create rich, well-styled Sharepoint forms with tabs and complex tables directly in the browser with an easy-to-use drag-n-drop interface.

The new version allows for targetting of forms by SharePoint groups. Now specific fields or even tabs of forms can

Kofax moves into the digital mailroom

Kofax has announced its first digital mailroom solution that adds analytics and visualisation dashboards to enable organisations to track, review and modify information at any point in the business process.

Automated digital mailrooms are used in a wide variety of industries, such as banking, insurance, government, and business process outsourcing (BPO). BPOs, third-party firms whose services include the secure management of critical business functions such as invoice processing and image based document storage, use these to ingest and process incoming mail for their customers.

Documents in paper or electronic formats are first captured, digitally classified and separated, and then data is extracted according to business rules established by the customer. The extracted information is then validated to ensure its accuracy and validity before being distributed to customer workflows and processes.

For example, an insured driver can initiate a claim process by submitting the related documents to their

automobile insurance provider. These may actually be received by a BPO providing outsourced mailroom processing for the insurer. The documentation is then captured and processed.

If any of the documents or information therein is missing, Kofax Mailroom Automation automatically alerts the insured to submit the required information, which can be accomplished on paper or via fax, email, Kofax Web Capture or Kofax Mobile Capture. A line-of-business employee, such as a claims adjustor, is also alerted to the missing content to assist in resolving any discrepancies.

These capabilities provide visibility into the status of the claims process from the moment a claim form is submitted at the Point of Origination until it is passed to a claim adjudication and payment system for final resolution. The customer and claims adjustor have increased control over the process, an increased ability to collaborate in resolving exceptions, and a clearer idea of when the claim will be resolved for better customer service.

be concealed from a group of users. It supports customisation of forms of Document Sets including new forms.

All forms generated with Forms Designer can be further modified with Sharepoint Designer. So, if users need more functionality than Forms Designer can provide, they can open generated forms in Sharepoint Designer and add necessary modifications.

Apart from additional javascript modifications, Forms Designer users can change the style of forms by adding their own CSS-styles based on a company's brandbook.

<http://spform.com>

Improved relations between Oracle and SAP

Portal software developer United Planet, has introduced a graphic "Relationship Designer" module that links data from all software systems operating within an organisation in the latest release of its intranet and portal software, Intrexx 6. The new Intrexx module retrieves data from key business systems, irrespective of their manufacturer, providing centralised access to mission critical information for employees via the company intranet. After a specific piece of information is requested, the Intrexx Relationship Designer automatically searches the linked systems for thematically connected information and displays it on the intranet in a clearly structured manner.

After linking data fields from Microsoft Dynamics CRM with those in SAP ERP, for example, staff members will immediately be able to see which sales employee is responsible for a specific customer, what this customer ordered most recently, and also if there are invoices that are still unpaid. If the email system is also linked up, employees will also be able to access the latest customer correspondence.

Axel Wessendorf, Lexware founder and CEO of United Planet, explains: "The problems associated with keeping important information on disparate software systems (CRM, ERP, enterprise portals, etc.) are familiar to many

companies. Information is often only available in small excerpts, and rarely in its entirety which means that employees are provided with an incomplete picture at best.

"Using Relationship Designer, connections that tended to be overlooked in the past are now immediately detectable which is likely to present companies with a variety of new business opportunities, especially in the area of customer relationship management," he says. Intrexx 6 is available as a free download.

www.intrexx.com.

OBS takes on TRIM integration

SharePoint solution provider OBS has moved to broaden its offerings for records management with the addition of support for HP TRIM. OBS will support TRIM records management for SharePoint in addition to its own locally developed records management product, i5.

Desmond Russell, National Solutions Specialist OBS explained the move was in response to the demand from many existing TRIM users to adopt SharePoint as a user-friendly front end.

"OBS core strength is around consulting and implementation skills around the SharePoint platform, whether its CRM, intranet, document management or records management.

"Where its a SharePoint-only site we will implement i5, but there are many new SharePoint users who want to integrate with an existing implementation of HP TRIM.

"The latest edition of HP TIM 7.3 works well with SharePoint to help drive user adoption of records management by making it easier and less evasive for users. We're not there to sell TRIM RM licenses, we're there purely to focus on the SharePoint integration.

"Together with this announcement we have launched a program, HP TRIM Readiness Assessment and Strategy (RAS), to help customers set a vision and strategy roadmap for the HP TRIM SharePoint modules."

Can an ordinary Smartphone double as a professional-grade scanner?



It can if it's sitting on top of specialised Scandock base station, says developer Atiz Innovation, a pioneer in book digitisation hardware.

The Scandock features an aluminum base, silicone flat mat for document placement, crystal plexiglass neck and dual-track lighting arms. This results in a professional scan miles away from the blurry and poorly lit closeup typical of Smartphone capture.

Scandock's colour pad, called the Image IQ, provides colour profile information embedded in every scan. The Scandock app uses that information to auto-correct every image and produce true-colour scans.

Users simply place the item to be scanned on the mat, and insert a smartphone into the dock. That action automatically turns on the two adjoining lights, designed to provide even light distribution with no glare, even on glossy materials. The user can then open the downloaded Scandock app and capture high-resolution images.

Scandock lets users create PDFs, edit images, email or upload images, or air print to a nearby printer. All scans are neatly organised in a library stored on the smartphone. Users can manage or group multiple documents together as a single PDF file. In Multi-Doc mode, Scandock can capture many items (e.g., receipts or business cards) in a single shot. The app then auto-crops and separates the items into individual documents.

"The quality of Scandock's true-colour scans clearly sets it apart from other portable scanning devices," said, Nick Warnock, CEO of Atiz Innovation Inc. (USA). "Scandock provides the best way to obtain high-quality scans in a post-PC world."

Scandock will be available in early 2013. Compatible smartphones include iPhone 5, 4s, 4, iPod touch (5th generation) and most Android phones including Galaxy S3, Galaxy Note, Galaxy Note 2 and HTC One X.

The Scandock iOS app is currently available for download from the App Store with about 80 percent of features complete. The full version and an Android app is expected to be available in early 2013.

"We envision that every modern workplace that needs professional output will eventually replace their conventional multi-function printers with Scandock," said Dr. Sarasin Booppanon, CEO of Atiz Innovation Co., Ltd. (Thailand).

"Libraries, law firms, schools, medical offices, insurance companies, government agencies – the possibilities for Scandock locations are endless."

www.atiz.com

Nuance launches eCopy ShareScan 5.1

Nuance Communications has announced eCopy ShareScan 5.1, the new release of the document scanning and workflow solution for networked multifunction printers (MFPs) and scanners. Improved installation and setup features reduce installation making it up to 17 times faster, enabling configuration and deployment across multi-server environments in mere minutes, while reducing the total cost of maintenance.

eCopy ShareScan runs embedded on the market's leading MFP vendors including Canon, HP, Xerox, Ricoh and Konica Minolta, while also supporting any networked MFP and scanning vendor via eCopy ShareScan ScanStation software. The new release adds flexibility to single sign-on authentication options, and improves scan workflow configurations. Combined, these features lead to users spending less time at the device, while ensuring that organizations meet their security standards. A 5x improvement in form processing recognition performance and accuracy of Nuance's industry-leading OmniPage optical character recognition (OCR) technology better automate customer ad-hoc transaction workflows.

eCopy ShareScan 5.1 is now bundled with more copies of eCopy PDF Pro Office, the company's desktop software which allows users to create, view, convert, edit and collaborate with 100 percent industry-standard PDF files.

The new release lets users complete scan jobs at the MFP in fewer steps and requires fewer transitions between processes to get jobs completed. It also automates scan-to-self and ad-hoc scanning to reduce time spent at the device. eCopy ShareScan's Forms Processing Extender (FPE) can now recognise forms five times faster than previously, while also improving recognition accuracy and adding additional Barcode support options.

Database improvements enable eCopy ShareScan to fit right into enterprise environments with improved account and permission options as well as improved database clustering support.

Nuix updates eDiscovery software

Nuix has announced the release of version 4.2 of its eDiscovery software including an open and defensible predictive coding engine, as well as manual and automated, keyword-based redaction of sensitive information.

"This release builds on our core strength of indexing, searching and managing huge volumes of unstructured data faster and more reliably than any other available technology," said Stephen Stewart, Chief Technology Officer at Nuix.

Nuix says its predictive coding technology uses open, proven textual analysis techniques that are easy to under-

stand, use and explain.

"The legal industry has been reluctant to accept 'black box' predictive coding technologies it couldn't understand, much less defend in court," said Stewart. "Nuix 4.2's predictive coding provides a powerful way for eDiscovery professionals to quickly sort the relevant from the irrelevant to minimize onerous manual reviews.

Nuix 4.2 includes the ability to create redaction mark-ups for each production set, reducing the risk of releasing privileged or sensitive information. Legal teams can create mark-ups manually or automatically redact text based on a word list.

The upgrade adds to the list of hundreds of file formats Nuix can read, with support for Cellebrite and Micro Systemation XRY mobile device images; Autonomy IDOL IDX files; and more metadata from Mac OS and Linux file systems. It also deepens Nuix's capacity for investigation and forensic analysis of data by recovering deleted files, processing slack space, indexing and viewing the Microsoft Windows registry and examining the binary structure of files in a hex viewer.

Compliance Guardian for SharePoint

AvePoint has released Compliance Guardian, which is designed to ensure information is available and accessible to the people who should have it and protected from those who should not.

AvePoint says its new offering bridges the gap between compliance, IT and the business to begin and maintain a constructive, productive and compliant environment. Further, it allows organizations worldwide to implement a robust risk management framework that supports key compliance and risk areas, including:

Accessibility--Organizations can easily validate their IT systems, applications and content against standards-based and custom organizational policies for accessibility. The software's accessibility features allow users to test against regulatory requirements including Web Content Accessibility Guidelines (WCAG) 1.0 and 2.0, as well as other standards-based accessibility requirements.

Operational security--Compliance Guardian is said to help close operational and security gaps caused by inadvertent mishandling of data or relaxed permissions controls for information stored on the Web or internal systems, ensuring no information that is sensitive in nature can be inadvertently exposed or taken advantage of by a malicious third party, drastically mitigating risks of accidental breaches.

Privacy--The software scans and reports on enterprise content for sensitive data including personally identifiable information (PII), protected health information (PHI) as well as secure sensitive information (SSI); tags or classifies that content appropriately; and takes action to protect your environment from privacy violations by deleting, quarantining, securing or routing content to a more appropriate location.

Site quality--Compliance Guardian helps organizations comply with branding, usability and look-and-feel guidelines to maintain and ensure optimal user adoption, says AvePoint.

CVISION releases PdfCompressor 6.0

CVISION Technologies has released the newest edition of its document optimisation software, PdfCompressor 6.0.

The new release includes improved file compression quality, increased OCR recognition accuracy, faster compression processing speed, and support for up to 117 OCR languages. Built for high-volume, corporate environments, the newly updated PdfCompressor 6.0 is designed to optimise PDF documents, making them smaller, faster, more accessible and easier to process. With best in class OCR & dramatic file compression, PdfCompressor 6.0 not only integrates with existing workflows, but also improves them by producing significantly more manageable files. This allows organisations to spend less time managing their digital files and more time on value-producing tasks.

PdfCompressor 6.0 is claimed to achieve 5%-10% more accuracy than leading OCR engines by means of leveraging advanced image processing techniques, some of which include re-sampling, foreground/background separation, and auto-rotation. PdfCompressor 6.0 also converts 14 file formats, including TIFF, JPEG, and PDF, to either PDF or PDF/A for long-term archiving.

contentCrawler integrates with SharePoint

DocsCorp has announced its contentCrawler framework for making image-based documents completely text-searchable now extends to cover SharePoint libraries.

The solution has been designed to open up content held in repositories that may be non-searchable and therefore "invisible" to search technology. "In terms of search, SharePoint has a couple of challenges: SharePoint does not require a lot of metadata to be associated with a document; SharePoint makes it very easy for users to create new sites for storing documents. If there is little or no metadata to search, or the exact location of the document is unknown, documents can go missing! Compounding the problem are image-based documents, which can be extremely difficult to locate under the best of conditions," says Dean Sappey, DocsCorp President.

Image-based files such as faxes, image PDFs and scanned documents often get profiled in the MS SharePoint through a variety of workflow loopholes; email attachments, legacy documents, mobile technology, documents ingested from acquisitions and imported litigation files. These image-based documents are "invisible" to MS SharePoint as there is no text to search.

contentCrawler can search an entire SharePoint library or a subset of documents based on specific queries. It works in the background to identify non-searchable content (image files, PDF files, and emails), converts it to a text-searchable PDF and saves it back into SharePoint as new versions or as replacement documents.

Sappey adds "if you don't know the extent of the problem, or you are not sure if you have a problem, DocsCorp invites you to download its contentCrawler Audit tool, which will provide you with a snapshot of your MS SharePoint content. contentCrawler also integrates with Autonomy iManage, OpenText eDOCS DM, OpenText Content Server, OpenText Livelink, ProLaw, Worldox as well as MS Windows file systems. Request the contentCrawler audit tool from www.docscorp.com/cc

EzeScan cleans up its act

EzeScan has announced a new release of its scanning software with improved image clean-up/enhancement processing, better Q/A on larger batches, powerful new email import features and faster PDF creation.

Now compatible with the Microsoft Windows 8 OS, EzeScan has added the ability to create multiple image enhancement profiles within a job. A different enhancement profile can be assigned to scanning, import folder and import file modes.

Viewing also now has its own enhancement profile. By default a profile called 'Default' is assigned as the enhancement profile for scanning, import folder, import file and viewing. This can then be disabled in each mode by selecting 'None', or simply set to another custom enhancement profile name. EzeScan now also supports splitting an image into N rows and N columns. Each column or row can be individually sized based on a percentage of the original image height and width. This is ideal for splitting fan-folded or booklet documents into a multipage TIF or PDF.

Other new features include:

- the ability to write a customised page number onto a scanned image using the Mark-up options;
- more accurate Invoice Processing, as ABN searching now includes modulo checking to ensure that the only valid ABN numbers are found; and
- improved email import functionality. There is now an option to import an email in an .eml file format.

There are a number of new features specifically for SharePoint users:

- Taxonomy support has been added to EzeScan's upload connector;
- Cloud based customers can now use EzeScan to scan images into SharePoint Online; and
- EzeScan can now launch a SharePoint workflow when a scanned document is stored into SharePoint.

www.ezescan.com.au

Foxit delivers PDF security solution

Foxit has launched a new product that encrypts and protects PDF files with permissions and authorisation settings through programmatic interfaces to prevent sensitive information from being printed, edited, and copied by unauthorized users in Active Directory Rights Management Services (AD RMS) environments.

The Foxit RMS PDF Protection Tool is part of the Foxit PDF Security Suite solution for protecting PDF files. The programmatic interfaces provide both Command Line Interfaces (CLI) for IT administrators to run in scripts or on-demand and C programming interfaces for developers to incorporate into existing applications. Both the CLI and C programming interface support any file sharing/file repository environment to protect and unprotect files.

Key features of the RMS Protection Tool for PDF include:

1. Programmatic protection (encrypt) and unprotection (decrypt) of PDF files with specified RMS rights policies. Shields the details of the implementation, allowing the user to protect and unprotect PDF files programmatically

using a few simple interfaces.

2. Batch protection and unprotection of PDF files. Allows bulk, on-demand, and event-based file protection and unprotection.
3. Retrieval of official Rights Policy Templates from RMS servers in real-time.
4. Application of dynamic security watermarks. Dynamic security watermarks automatically display viewer identity information on protected PDF files in case users copy confidential information by using screen shots, cameras, mobile phone cameras, video capture, or other similar methods.
5. Generation of activity log files that keep a history of what files are protected/unprotected and when they were protected/unprotected.
6. Out of box integration with File Categorization Infrastructure (FCI).
7. Consistent design with the Microsoft AD RMS Bulk Protection Tool and AD RMS SDK 2.0, providing a consistent user experience to protect PDF documents in a similar workflow as protecting Microsoft Office® documents. Applies uniform security and permission settings across documents file formats.

A free 30-day trial is available.

SharePoint workflow migration tool

HarePoint has launched a new software product for workflow migration in SharePoint environments.

Workflows are a critical part of any SharePoint environment today, providing the underpinning for smooth operations and for the teamwork essential to any organisation.

In most cases, a workflow is created according to the following steps: goals are defined and the process is planned from start to finish; the workflow is created in a test environment; and then the accuracy of the workflow's model is confirmed for reliability and for proper completion of the goals defined. When this testing is completed, the workflow is transferred to the production environment where it will be used from that point on.

But a surprising problem arises here: there is no practical tool for the migration of a completed workflow from a test environment to the production environment. Most often, the migration process – and this is a real headache for SharePoint administrators – involves exporting the workflow from the test environment into the production environment (choosing some adequate method of export), and then spending a significant amount of time adapting the workflow's settings to the new environment.

The administrator in this case is required to know all of the nuances of the workflow to complete this migration. Furthermore, there is the risk of failures and errors that can shut down the normal work of the SharePoint environment.

HarePoint Workflow Migration for SharePoint is designed for simple, quick and error-free migration of even the most complex workflows from one SharePoint environment to another.

"Our product not only supports migration of workflows between sites and farms, but is capable of saving them in

a file for complete, automatic deployment in a different site.” said Alexander Gorlach, Director of Strategic Development at HarePoint.

HarePoint Workflow Migration provides the ability to copy or move SharePoint workflows between any SharePoint sites and between different versions of SharePoint (2010 and 2013); migration of multiple workflows; and the elimination of post-migration configuration of workflows in most cases.

Industrial Drawing review out of the box

Fuji Xerox Asia Pacific has introduced the Drawing Difference Detection Box, a solution that automates the reviewing and checking process of modifications made to industrial drawings required by the engineering, construction and manufacturing industries.

Equipped for use with the Fuji Xerox’s ApeosPort-IV A3 colour multifunction device (MFD), the Drawing Difference Detection Box automatically compares drawings before and after revisions and highlights any changes in colours of choice. With this solution, laborious side-by-side visual checks are eliminated and quality of work improves by reducing review time and possible oversight.

The Drawing Difference Detection Box provides users with the flexibility to either submit drawings via a MFD or import electronic documents into a PC web browser for comparison. The results can be printed out directly without a PC, or output as an electronic file, reducing the time it normally takes per A3 drawing in a visual check from an average of 30 to 40 minutes to about five to 10 minutes.

E-mail notifications enable users to obtain, examine and delete each comparison result, while management functions provide the ability to customise the processing parameters of difference detection and the marking method to generate comparison results as necessary.

A job list and history display can be used to check the status of difference detection jobs.

The Drawing Difference Detection Box is capable of processing up to 100 pairs of drawings for comparison in a single job and of serving multiple clients in one office.

Social media content management tool

Integritie claims to have launched the world’s first social media content management tool.

Michael Veenswyk, Managing Director, Integritie said: “Compliance legislation requires financial institutions to be incredibly cautious with their communication with the outside world, and as a result there has been markedly slow uptake of social media in the sector. SMC4 changes all this, allowing organisations to communicate where their stakeholders are now listening, while adhering to regulatory requirements”

SMC4 also enables measurement of impact, engagement, reach and ROI of social media marketing initiatives. Detailed analytics enable financial services firms to compile and mine rich customer analytical data, providing valuable demographic information.

“Critically, it also enables social media integration with

companywide workflows. This means that, for example, a complaint made through Facebook is routed into the same workflow that is responsible for managing complaints through any other communications medium.

SMC4 logs and archives all social media interaction including information flowing in and out of an organisation. Detailed analytics capabilities also enable a financial services firm to compile and mine rich customer analytical data, providing valuable demographic information.

It has embedded content dictionaries, tailored specifically for the financial industry which allows it to monitor two-way communications between financial advisors, customers and potential prospects. The tool also passes intended outbound information for textual analysis to interpret if a user is saying something inappropriate. If so, it is routed to quality control for corrective action.

The entire system can be searched for relevant information. The resulting items can then be locked for legal hold and therefore cannot be deleted until such a time as the legal issue or compliance has been satisfied. Additionally, by adhering to eDiscovery standards, an extract of the data and all related information can be easily copied to transfer media and presented to the appropriate authorities or opposing legal counsel for their use.

Kofax takes AP automation solution mobile

Kofax has announced the launch of MarkView for Accounts Payable 8.0, a mobile solution for the automated capture and processing of accounts payable (AP) information. It allows cameras in mobile devices such as smart phones and tablets to capture, view, manage and approve information from receipts and invoices within a secure chain-of-custody that includes AP processes and workflows.

Kofax MarkView for Accounts Payable is a capture enabled financial process automation application for AP and other functions. It automates the receipt and capture of paper and electronic invoices, extracts relevant data from that content, perfects it and then manages the information into workflows for routing transactions through exception handling and approval processes.

Kofax MarkView leverages Kofax Mobile Capture, which allows mobile devices to become viable tools for information capture and automation solutions.

Once captured, an image cannot be altered or tampered with and does not remain on the mobile device.

“Kofax MarkView for Accounts Payable addresses the most critical accounting functions facing organizations today – confirming, approving and paying invoices,” said Martyn Christian, chief marketing officer at Kofax.

“Secure mobile functionality puts AP review and approval capabilities directly in the hands of the user, wherever located, which significantly speeds processes and provides better cash management. The benefits of a more timely and interactive mobile AP solution are apparent and invaluable.”

Laserfiche announces Version 9

Laserfiche has released Version 9 of its namesake software, offering tightly integrated BPM and ECM tools.

A major feature of the new release is the integration of

Laserfiche Forms which extends business processes to the point of capture by allowing organisations to collect, process and route information electronically via Web-based forms.

For business processes there are new "super workflows" that enable users to start workflows on a document from the Laserfiche Client or Web access and report on that workflow's progress at every step.

Users can now access Laserfiche features when working with Microsoft Office files in native applications through Web Access; while Laserfiche SDK 9.0 also includes a new Client Automation Tools (CAT) feature, a .NET assembly that supports the handling of multiple instances of the Client, launching of business processes, etc.

Upgrading to Laserfiche 9 from Version 8 does not require a full migration procedure. Laserfiche 8 repositories will be automatically updated to 9 upon upgrade.

Kenneth Chin, Gartner vice president of content, collaboration and social, says the expectation from ECM buyers is for lower cost and quicker implementation.

"They are looking for a solution that requires less services and takes less time to deploy. There is also a generational refresh – lots of products and platforms need to move to the next generation. And a lot of the focus is on the end-user interaction (i.e. how user friendly is the product)

"Organisations are less concerned with technologies and more concerned with solutions.

"Solutions that meet needs where transactions drive the process. Social content management is also a focus for many organisations."

Litéra releases Secure File Transfer product

Litéra has announced the general availability of Litéra Secure File Transfer, which allows users to send encrypted emails and attachments of any file type up to 100GB

It includes electronic signature functionality to allow a user to execute a document, such as a contract or agreement, that is sent using Litéra Secure File Transfer.

Litéra Secure File Transfer is available as a hosted or on premise private cloud application. Users can send large files up to 2GB directly from Microsoft Outlook or up to 100GB using the web interface.

Users can also view a full audit trail of sent and received files, including time-stamping, proof of delivery to email server and inbox, and open notification.

"Common methods of transferring files have introduced enterprise-wide concerns of security and compliance," said Norm Thomas, CCO of Litéra.

"In fact, the average business cost of a data breach is between \$US5 million and \$US8 million.

To mitigate this risk, businesses need a solution which raises the security and auditability of transferring sensitive or confidential information and files. Litéra Secure File Transfer invokes the most secure encryption technology available to protect an organization from information leaks."

Additional features include central policy management for administrators, full scalability and mobile device access.

What's happening

February 26 & 27

The 4th Annual National Records and Information Officers' Forum 2013, Melbourne

This upcoming conference focuses on successful EDRMS implementation across various sectors and draws attention to the convergence of records, information and knowledge management.

<http://liquidlearning.com.au>

March 5-7

Data Quality Asia Pacific 2013 - The End Game, Sydney

A must see speaker line up:

United Nations Conference on Trade and Development (Switzerland), World Trade Organisation (Switzerland), University of Arkansas at Little Rock (USA), Walgreens (USA), Singapore Post (Singapore), SBI General Insurance (India), Sinclair Knight Merz (Australia), Telstra (Australia) ANZ (Australia).

Request Brochure: aga@arkgroupasia.com

www.dqasiapacific.com

March 13-15

Big Data 2013, Sydney

Join Richard Peake from Aimia at Big Data 2013 as he shares strategies for securing customer data. Richard is one of two dozen experts who'll show you how to profitably leverage big data. You'll learn to: Maximise the effectiveness of social media strategies; Tap into big data for crowdsourcing and crowdfunding; and Improve the customer experience through analytics.

www.acevents.com.au/bigdata/

April 10-11 Sydney, April 16-17, Auckland, June 11-12 Melbourne

Australia SharePoint Conference

These events are designed for anyone who wants to know more about SharePoint - business users, techy people and executives can mix and mingle with the best SharePoint MVPs, Microsoft personnel and experts from around the world.

<http://www.sharethepoint.com/engage>

May 13-14

Gartner Business Process Management Summit 2013 Sydney

For those new to BPM, the Summit will help you to take the first steps, establish the skills required, and identify the right technologies. For those who are more experienced, the Summit will describe the next generation of BPM best practices and BPM technology while helping you leverage new approaches such as social and mobile BPM, cloud and intelligent business operations.

gartner.com/ap/bpm

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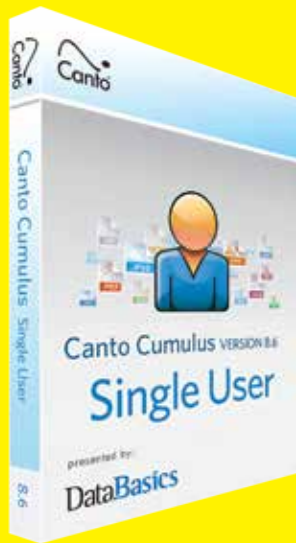


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